

MAY-JUNE 2013

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*Soldiers with the 515th Transportation Company Forward Logistics Element convoy during a resupply mission in Afghanistan Aug. 17, 2012. (Photo by Spc. Nevada Jack Smith.)*

“Tomorrow’s Soldiers will be critical thinkers capable of diagnosing equipment faults on previously unseen equipment by applying knowledge garnered through a systems approach to training.”

—Maj. Gen. Larry D. Wyche  
Commanding General, CASCOM

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PB 700-13-03

VOLUME 45, ISSUE 3  
MAY-JUNE 2013

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*Army Sustainment* (ISSN 2153-5973) is a bimonthly professional bulletin published by the Army Logistics University, 2401 Quarters Road, Fort Lee, Virginia 23801-1705. Periodicals postage is paid at Petersburg, VA 23804-9998, and at additional mailing offices.

**Mission:** *Army Sustainment* is the Department of the Army's official professional bulletin on sustainment. Its mission is to publish timely, authoritative information on Army and Defense sustainment plans, programs, policies, operations, procedures, and doctrine for the benefit of all sustainment personnel. Its purpose is to provide a forum for the exchange of information and expression of original, creative, innovative thought on sustainment functions.

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EDITOR ARMY SUSTAINMENT/ALU/2401  
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# Skills-Based Training Promotes Lifelong Learning for Army 2020

■ By Maj. Gen. Larry D. Wyche



**T**roop redeployments from Afghanistan, force drawdown, force restructuring, and an evolving national security climate require the Army of 2020 to be diverse and adaptive and learn and respond faster than the enemy to “guarantee the agility, versatility and depth to prevent, shape and win,” according to the 2012 Army Strategic Planning Guidance.

Combatant commanders need technically proficient Soldiers who can quickly adapt to new situations, think on their feet, and work in complex environments. Skills-based training (SBT) and credentialing improve readiness and allow our logistics units to more responsibly support unified land operations of the future. These initiatives demonstrate our efforts to reinvigorate our core competencies in order to extend operational reach and enable freedom of action.

The sustainment community recognizes the need to provide commanders with personnel who are better equipped to handle the changing operational environment we face today and who can effectively work on multiple pieces of equipment. The Combined Arms Support Command (CASCOM) is delivering just such game-changing professionals, beginning with our advanced individual training (AIT) graduates.

## Applying Skills-Based Training

“Nearly a decade of conflict has shown the Army that it is extraordinarily difficult to prepare Soldiers for every battlefield contingency. Instead, Soldiers and leaders must

master a set of critical core competencies that provide a foundation for operational adaptability,” according to the Training and Doctrine Command Pamphlet 525-8-2, Army Learning Concept 2015.

At the Army Ordnance School, AIT Soldiers are developing the 21st century competencies of adaptability and initiative, teamwork and collaboration, and critical thinking and problem solving by using the tenets of skills-based training. SBT promotes the development of today’s Soldiers through the practical application of knowledge and skills using operational situations. Teaching Soldiers to become critical thinkers—capable of understanding problems as they arise rather than simply repairing specific equipment items—allows them to more rapidly become productive members of their units’ maintenance teams.

SBT relies heavily on three of the basic tenets of adult learning theory: experience (including mistakes) provides the basis for learning; adults are most interested in learning subjects that have immediate relevance to their jobs or personal life; and adults learn best when learning is problem-centered rather than content-oriented.

SBT includes real-world scenarios to encourage the transfer of learning to field expectations and draws on the use of troubleshooting and diagnosing to solve problems. In other words, SBT assigns Soldiers the role of adult learners capable of taking ownership of their learning and employing critical thinking to complete tasks.

SBT differs from legacy training in several ways. Instead of relying on lectures with infrequent hands-on equipment time that consisted primarily of remove-and-replace actions, SBT decreases the number of lectures and increases the frequency of hands-on demonstrations and practical exercises focused on theory and diagnostic techniques—a dramatic shift from traditional platform instruction.

In the SBT curriculum, the program of instruction focuses on skills that can be applied to multiple systems. For example, in the military occupational specialty (MOS) 91J (quartermaster chemical equipment repair) course, Soldiers learn how to diagnose electrical faults on the 3,000 gallon-per-hour (GPH) reverse osmosis water purification unit (ROWPU).

After receiving minimal instruction, Soldiers work in small groups and practice the skills learned on the less complicated 600 GPH ROWPU. Finally, the Soldiers may demonstrate mastery of the required skills using another piece of equipment, such as the tactical water purification system. As a result, Soldiers develop confidence in their ability to transfer the learned skill from one equipment item to another. Soldiers arrive at their units better able to contribute to the mission.

SBT gives Soldiers more hands-on equipment opportunities focused on acquiring diagnostic skills applicable to systems rather than individual equipment items. More hands-on time serves to boost a Soldier’s confidence with the tools and equipment of his trade.

## The Transition to SBT

The AIT course for MOS 91D (power generation equipment repairer) was the first at Fort Lee, Va., to officially transition to SBT. The course length was reduced by 24 percent. Although this result may not be typical, SBT is expected to reduce course length, barring the introduction of new technology that must be taught in the courseware. Four other Ordnance School courses have converted to SBT at Fort Gordon, Ga.

Soldiers and instructors alike have responded positively to the change in training strategy. Soldiers receive instruction in a collaborative learning environment with fewer slide presentations, take part in more opportunities for experiential learning, participate in peer-to-peer instruction, and engage in scenario-driven realistic training in accordance with SBT tenants.

Instructors have the opportunity to adapt lessons and use technology, such as mobile applications, simulations, videos, and other training aids to enhance the learning experience. Instructors are now facilitators, true subject matter experts guiding their students to diagnose root-cause faults in a problem-centered learning environment. All of these efforts lead to better Soldier engagement, a more thorough understanding of content, more capable technicians in the field and enhanced unit readiness.

## Soldier for Life

Troop redeployments will also impact “130,000 active, Guard, and Reserve Soldiers who will reintegrate into communities each year, [equaling] more than one million [Soldiers] over the next 10 years,” according to the Soldier for Life Program website, [www.army.mil/SFL](http://www.army.mil/SFL).

The increased confidence and competence developed through SBT helps Soldiers attain civilian credentials for their military learning. CASCOM schools continue to work with civilian agencies and conduct pilot programs in the development of multiple credentialing programs.

Currently, the Ordnance School offers credentialing opportunities for nine military occupational specialties in conjunction with resident training. These initiatives include an Automotive Service Excellence certification pilot which began September 2012 for MOS 91B wheeled vehicle mechanics and involves Soldiers in the Advanced Leader Course and Warrant Officer Basic Course. During fiscal year 2013, 45 Soldiers will participate in this pilot program.

For Soldiers in the MOS 91E (allied trade specialist) AIT course, credentialing opportunities are available through the National Institute of Metalworking Skills. Since the program’s implementation in July 2012, more than 107 students have registered. One hundred and two students have earned one or more credentials through written and performance exams.

Other credentialing opportunities provide certification or licenses for basic electronics, computer networks, and environmental sciences. CASCOM’s transportation school is partnering with several states’ Department of Motor Vehicles to allow MOS 88M motor transport operators the opportunity to use a military skills waiver form, now accepted in 32 states, to qualify for a commercial driver’s license.

Quartermaster Soldiers in the MOS 92A (automated logistical specialist) and 92Y (unit supply specialist) Advanced Leader Course are participating in a pilot with the Manufacturing Skill Standards Council to earn a Certified Logistics Associate credential. In fiscal year 2013, 1,000 92G food service specialists in both AIT and noncommissioned officer schools have enrolled in apprenticeships with the American Culinary Federation. These apprenticeships lead to certified culinarian credentials.

Credentialing and SBT are integral to developing Soldiers who have positive attitudes toward learning. SBT develops confidence and reduces fear of learning through experiential learning, and credentialing promotes

self-confidence and lifelong learning.

Credentialing programs offered through military training institutions are just the beginning of lifelong learning opportunities available to Soldiers. These programs help ensure Soldiers are competitive whether they remain in the military or enter the civilian workforce. Commanders should encourage Soldiers to continue seeking advanced certifications, both to increase their value to their units and to broaden their job opportunities in the private sector.

Incorporating technology, collaborative learning environments, and facilitation in institutional training provides a much needed update to learning strategies that focus on the needs of the learner. Tomorrow’s Soldiers will be critical thinkers capable of diagnosing equipment faults on previously unseen equipment by applying knowledge garnered through a systems approach to training.

Using credentialing programs allows Soldiers to stay abreast of emerging maintenance trends, become better assets to their units, and acquire marketable skills. Our mandate is to develop a synchronized strategy that integrates the common ground among credentialing, force readiness requirements, lifelong learning, and educational opportunities that achieve real results.

The goal is to develop Soldiers’ abilities to become problem solvers so that they are able to think their way through situations as quickly and as efficiently as possible. This ability will have a positive effect on readiness in our Army. The successful integration of SBT initiatives and adult learning principles gives Soldiers the baseline competencies to perform their jobs effectively and efficiently as we transition to the Army of 2020.

Maj. Gen. Larry D. Wyche is the commanding general of the Combined Arms Support Command and Sustainment Center of Excellence at Fort Lee, Va.

# Logistics Professional Education: A Reflective Practitioner Approach

**T**he Army Logistics University (ALU) invites you to read and discuss “Logistics Professional Education: A Reflective Practitioner Approach,” available at [www.army.mil/armysustainment](http://www.army.mil/armysustainment). I hope this draft white paper will provoke professional debate about logistics education both inside and outside our community.

In the tradition of past military-oriented white papers, the idea behind this document is to critically and creatively offer some ideas to the institution that may eventually lead to a significant change in philosophy or culture and even drive substantive changes with the future in mind.

With a similar intent, the Army recently formed the Logistics Professional Education Board (LPEB). The board’s voting members include the Army G-4, the Army Materiel Command deputy commanding general, and the Combined Arms Support Command commanding general.

The LPEB was designed to form a guiding strategic body to shape the future of Army logistics education. The board will give the Army logistics community the opportunity to synchronize its many learning initiatives. It will also facilitate the development of an integrated logistics education process that is tied to the

Army’s overarching strategies and priorities. However, as noted in the white paper, it is vital for the LPEB, its council of colonels, and its various working groups to seek the continuing advice of logistics professionals as well as professional educators.

Both the white paper and the LPEB will help us to educate and develop adaptive sustainers to have the skills and knowledge to excel in the future environment. I invite any and all professionals to join this interesting and necessary debate.

—John E. Hall  
President

Army Logistics University

*Editor’s note: Below is an excerpt from the white paper “Logistics Professional Education: A Reflective Practitioner Approach.”*

## Educating for Novelty and Mission Command

Throughout our long military history, the U.S. Army has expected Army logisticians and their organizations to routinely face novel situations in highly complex environments. Therefore, logistics education must begin with envisioning the eventuality of having to challenge our military logistics apprentices with scenarios involving zones of indeterminate practice and exercising methods of action learning on the journey to becoming a reflective practitioner—influencing how they “think in- and on- action” along the way.

Action learning is a collaborative approach to facing novel, problematic situations for which ambiguous and emergent tasks become the vehicle for learning. By emergent tasks, we mean trying to figure out what to do when everything that we do is tied to a complicated and interactive milieu of incongruous actors and activities based in a setting that is interdependent, dynamic, and where convergent and assimilative forms or knowledge are inadequate to frame what is happening or not happening. By action, we are not just concerned about

behavior (the physical aspects of doing) but also finding new meanings during and after our acts. Hence, divergent and accommodative learning is acquired in the midst of collectively and critically reflecting “in-” action and “on-” action (the essence of professional practice). In short, education spurs the reflective military logistics practitioner to “learn to learn” more effectively in collaboration with others. Action learning, coupled with the ideal of reflective practice, is complementary to the central themes of both mission command and adaptive leadership. The need to exercise disciplined initiative and independent action drives an educational philosophy that helps professionalize logisticians to adapt effectively without reliable and detailed guidance from higher authority when faced with zones of indeterminate practice. To facilitate this overall intent of military logistics professional education, we propose the following conceptual framework. ...



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Or go to [www.army.mil/armysustainment](http://www.army.mil/armysustainment) and click on the link.

## An Air Force Perspective on the Term “Sustainment”

The Army is typically the Air Force’s largest customer. When the Army speaks, the Air Force listens. We Air Force personnel read *Army Sustainment* and weekly lessons learned from the Center for Army Lessons Learned. Cargo planes are built, fighter tactics are developed, and members of Congress are influenced based on the needs of the Army customer.

Dr. Chris Paparone’s article “Logistics Misconstrued,” from the January–February 2013 issue of *Army Sustainment*, asserts that the emphasis on “sustainment” in joint and service doctrine detracts from logistics to a point of concern. Viewing the article through my Air Force airlift planning lens, I disagree. Rather, I am both excited and confident in the way ahead signaled by the proper and increased use of the term “distribution.” This use confirms the expeditionary mindset of theater logistics and force projec-

tion as foreseen by the Joint Deployment and Distribution Enterprise, the joint logistics environment, and the vision established in the Joint Logistics Compass.

As I look to the future and know that the United States will have to deal with area denial and access denial and fight from intermediate staging bases outside the joint operations area, I am sure that logistics and distribution doctrine are on sound footing and we are prepared to execute various missions in our nation’s interest. I feel that “sustainment” adequately recognizes the Army and Air Force’s collaboration with the Defense Logistics Agency and other national logistics partners without returning us to a post-Cold War “garrison force” or “supply” mentality that includes a large footprint, large order quantities, and large warehouses.

Deployment, distribution, and sus-

tainment together enable the essential elements of unified combat operations: effective mission command and effective presentation of forces to the joint force commander. Our largest threat to efficient and effective logistics is not logistics erosion from the term sustainment but, instead, the complacency developed over the past 20 years. This complacency happened because joint force commanders and land component commanders were never limited by logistics across the entire range of military operations.

As resources become constrained, we need to invest in “robust white cells” for our major exercises and make sure that scenarios and exercise planners do not “fairy dust” sustainment and distribution. Thank you for the opportunity to share my two cents.

—Stephen Lenzi

**Air Mobility Operations Instructor  
Air Mobility Command**

## Sustainment Misconstrued

Changing doctrinal terminology is not an endeavor that the doctrine community undertakes haphazardly. The development of the term “sustainment” was not a fad initiated by some colonel trying to make his mark before retiring. This terminology has been an issue that learned veterans of military logistics have been agonizing over for years.

In the January–February 2013 *Army Sustainment* article “Logistics Misconstrued,” Dr. Chris Paparone challenges the use of the word “sustainment.” Unfortunately, his etymological analysis does not bring clarity to the discussion and fails to address the practical needs driving the new terminology.

The Training and Doctrine Command changed the terminology because the Army was undergoing a revolution in training, combat operations, and logistics support. During discussions in the mid-2000s, the terms “logistics” and “combat service support” caused constant confusion. These terms have meanings rooted in their dictionary context, and they

have theoretical history as well.

However, these terms were also the names of the functional practices that were being phased out and would no longer exist. We needed to differentiate among the lexicon, the theory, the old methods, and the new process.

Usually the title of the workflow serves as the name of a process. “Combat service and support” is the old name of the previous process. But if the mission is humanitarian aid or disaster relief, then the word “combat” does not apply since it represents the wrong outcome. Likewise, the words “logistics” and “administration” both have too much history from the old school.

Hence, the concepts and doctrine community focused on the outcome of the process and titled the new process “sustainment.” It is not a perfect word, but it successfully highlights that the process is new and curtails confusion with the last generation of methodologies and processes.

In every academic sense, Dr. Paparone is correct to use the word “logis-

tics” for discussions of abstract military theory. However, theorists can get away with using a word in broad general terms with fuzzy boundaries. This way, abstract theory is timeless and not constrained by the immediate and transient considerations of practical realities.

In Army doctrine, we don’t write theory; we define practice. Words have meaning—until they cause confusion and get in the way. It was out of necessity that we turned to using “sustainment” as the title to the process. Sustainment is a word that is free of the preconceptions that created ambiguity and caused confusion. This word is free to clearly discriminate between the old and new processes.

The academic theory is called “military logistics,” but for practical reasons, the current process as practiced by Soldiers in the field is titled “sustainment.”

—Charles Bissett

**Military Analyst  
Combined Arms Support Command**

# A Case for “Soft Logistics”

■ By Dr. Christopher R. Paparone and George L. Topic, Jr.

The concept of “soft power,” a term coined by political scientist Joseph Nye, emphasizes the use of noncoercive means to achieve strategic ends in the realm of international relations and, by extension, national security.

Nye highlights the huge influence that the United States and Western popular culture have on other societies. The concept of soft power has matured in recent years and now a wide array of operations and activities is included under this umbrella as shaping or “Phase 0” operations.

In the future, such activities will take an even more prominent role and soft logistics activities will provide critical capabilities and support. However, we have not invested the appropriate time, effort, and resources to prepare logisticians to operate effectively in this niche; by happenstance, some logisticians learn these skills on the job. In other cases, the logistics community misses opportunities because it has not adequately developed its logisticians for this work.

Our purpose in this article is to offer our definition of soft logistics and a few ideas on how we might create specialized capacities to better prepare logisticians for this delicate craftwork.

We envision soft logistics as a strategic concept, not as part of an operational sustainment-of-forces concept, although the ultimate objective will often include enhancement of our operational capabilities. This perspective requires combatant commanders to look at soft logistics activities as part of the main efforts of a theater campaign plan.

Soft logistics could be the centerpiece of U.S. stability operations,

foreign internal defense initiatives, allied assistance, or support to insurgencies in unfriendly nations. Such initiatives may form the basis of securing strategic lines of communications permitting the United States access to markets and basing rights.

The logistics community should explore pathways to develop logisticians who specialize in this aspect of logistics operations. This may include education, training, and immersive assignments much like the Army’s Foreign Area Officer program or officer exchange programs. Logisticians can be developed to become regional experts working in various advisory roles and conducting area access analysis. One possibility is to work with the special operations community to offer logistics expertise to their developmental programs in target countries and regions.

We also should develop dedicated soft logistics capabilities, perhaps in concert with the civil affairs community and the U.S. Agency for International Development (USAID), that support U.S. foreign policy objectives. An example would be the assignment of more Defense Department logisticians to work in USAID’s Office of Foreign Disaster Assistance.

The logistics community should design and provide support for exercises and wargames that target the development of soft logistics skills. We should work with the U.S. Northern Command to build and maintain a cadre of experts focused on defense support to civil authorities.

As we look to the future and the requirements detailed in the Capstone Concept for Joint Operations

and Joint Force 2020, we know our logisticians will be called on to develop innovative support concepts and new capabilities.

We need to use our precious developmental opportunities to prepare our future leaders for these challenges. Sometimes the smaller, softer aspects of logistics can produce the most significant effects.

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Dr. Christopher R. Paparone is the dean of the College of Professional and Continuing Education at the Army Logistics University at Fort Lee, Va. He is a retired Army colonel and has a Ph.D. from Pennsylvania State University.

George L. Topic, Jr., is a retired Army colonel and the vice director for the Center for Joint and Strategic Logistics at the National Defense University at Fort McNair, Washington, D.C. He served as a Quartermaster officer for 28 years on active duty and for three years as the deputy director for strategic logistics on the Joint Staff.

*Editor’s Note: The Blind Spot is a new addition to Army Sustainment. The goal of this regular commentary is to encourage discussion on topics that the contributing authors feel may not be receiving enough attention from the logistics community at large.*

*The next Blind Spot will address the use of complexity science and chaos theory in the logistics enterprise.*

*We welcome your comments on this or any other sustainment related topic. Email [usarmy.lee.tradoc.mbx.leeasm@mail.mil](mailto:usarmy.lee.tradoc.mbx.leeasm@mail.mil).*

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# Rebuilding Technical Proficiency

Many sustainment Soldiers have found that their technical skills have eroded during the recent wars in Iraq and Afghanistan. The author notes that one reason is that the Army used contractors for many sustainment missions while sustainers conducted tactical missions such as convoy security.

■ By Chief Warrant Officer 4 Nichole Rettmann

During the past 10 years, sustainment unit training efforts have focused on building and developing Soldiers' tactical skills at the cost of their technical military occupational specialty (MOS) skills. Units depended heavily on the Logistics Civil Augmentation Program for sustainment requirements. This off-balance training focus and overdependence on contract support has resulted in a battle-hardened force of sustainment Soldiers, many of whom lack technical proficiency because they have not been working in their MOSs.

Now, as we enter the current resource-constrained environment, funding for contracts is being significantly reduced along with several other resources, and our Soldiers are once again expected to perform their technical missions.

The difference between MOS qualified and MOS proficient is the difference between merely knowing how to do the job and being skilled at the job. A Soldier is MOS qualified when he graduates from advanced individual training. However, field-experienced proficiency comes from two other spheres of training: unit and self.

## The Army Learning Model

The answer to MOS competency lies in the Army learning model, which is composed of three interlinked parts:

- Institutional schools for initial entry training and professional military education.
- Unit training and experience for building skill proficiency.

- Self-development training for total Soldier development.

Institutional training starts with initial entry training, which includes basic combat training and advanced individual training, and gives a Soldier the basic skills required to be awarded an MOS. Institutional training continues throughout the Soldier's career with the Warrior Leader Course, the Advanced Leader Course, and the Senior Leader Course. Each level of training addresses MOS critical tasks for that level.

MOS qualification by itself is not good enough. MOS qualification is merely the foundation—the point at which Soldiers begin their careers. Unit commanders are responsible for establishing training plans that build both technical and tactical proficiency. Every tactical training task has supporting technical tasks. Without the skills to perform these technical tasks, the tactical training event will not succeed.

MOS skills are perishable. They must be developed during every training period and exercise, or these skills can be lost.

Self-development training is the Soldier's sphere of the training model, where he uses his educational benefits to build skills through professional civilian education or credentialing programs.

## Erosion of Skills

To free Soldiers up for tactical missions, many sustainment tasks were contracted out during recent

conflicts. The Soldiers whose specialties had been contracted out were used for missions such as convoy security. This is a typical method of continuing operations without affecting the mission while drawing down "boots on the ground" numbers. Unfortunately, this tactic has been used for the duration of the recent wars in Iraq and Afghanistan. So for the past several years, many sustainment Soldiers have often worked outside of their MOSs.

## Back to Basics

After years of many sustainment Soldiers not performing their MOS duties, how technically qualified are they? Sgt. Maj. of the Army Raymond Chandler has directed a "back to basics" approach to training. This was also the topic of an article by Brig. Gen. Steven A. Shapiro in the November–December 2012 issue of *Army Sustainment*. Our leaders are calling for us to refocus our training efforts and rebuild MOS proficiency skills in our Soldiers and across our force.

These goals need to be translated into tracked metrics on MOS proficiency, personnel utilization rates, equipment usage, work order turnaround time, and other aspects of our technical skill areas. These goals need to be clearly communicated by our senior Army leaders and added to the officer and noncommissioned officer evaluation report support forms.

We have spent the past 10 years focusing our efforts on tactical training at the cost of technical skill.

Now it is time to look at how we can reinsert technical skill enhancement into every training event. Mandatory training requirements are not going away, so we as leaders must take a creative approach to meeting these challenges—an approach that optimizes time and talent with precision effect and does not sacrifice the technical but rather re-emphasizes it.

We need to empower sustainment noncommissioned officers to ensure that mandatory training requirements

All of these ways will not fit all Soldiers, which is why we need to empower noncommissioned officers to lay out how best to train each specific Soldier in the unit.

We must get away from the routine of recurrent monthly mandatory stand-downs to accomplish all of our mandatory training. We have to get back to building our Soldiers up in their technical skills so that they will be proficient in the MOS tasks they need to know, the tasks they

elements. It also provides a means of building effective staff teams at the combat sustainment support battalion and sustainment brigade levels. Cycling these elements through the NMTC on a rotational basis to validate them on their unit missions before they enter the available year of the Army Force Generation (ARFORGEN) cycle would be an effective way to sharpen their skills. In the past, units would focus training on their unit's mission; we need to get back to that.

Leaders, I challenge you. Look at your yearly training plan and where your units are in the ARFORGEN cycle. Look at the condition of your equipment and the technical skills of your Soldiers. Then re-insert technical skills into the plan if they are missing.

Establish a cyclic training program for your maintenance elements to rotate through the NMTC in your train/ready stage of the ARFORGEN cycle as a validation event before entering the available pool. Ensure that technical training is the foundation of your unit and command training events throughout your training plans.

Empower your noncommissioned officers and listen to your warrant officers as you are planning the training. They should be fully engaged in helping to develop the plan.

The results will be demonstrated in the product of technically proficient Soldiers who are ready to accomplish their mission of sustainment support.

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*Two Soldiers recharge an environmental control unit as part of their hands-on training at the National Maintenance Training Center at Camp Dodge, Iowa.*

are accomplished throughout the training day along with planned MOS training events directed to build each Soldier's technical abilities and skills. These mandatory requirements can be accomplished in several ways:

- Online training can be accomplished at home and certificates brought into the unit, resulting in two benefits for the Soldier: pay in retirement points (for Reserve Soldiers) and release from formation to proceed to the duty training area.
- Leaders can institute hip pocket or break area training throughout the day.
- Squad or platoon leaders can pull Soldiers together at the end of the day for an hour or so before closing formation or even after formation to wrap up whatever mandatory training was not completed throughout the day.

came in the Army to learn and perfect. A Soldier working in his MOS is a happy Soldier who will stay in the unit and in the Army. He may also develop into a highly proficient NCO or warrant officer candidate.

I recently paid a visit to the National Maintenance Training Center (NMTC) in Camp Dodge, Iowa, where we had two units participating in training. Other senior warrant officers and I observed Soldiers working on a myriad of military equipment. A member of our party asked one Soldier when he had last been able to train like this. The Soldier responded, "Probably about 10 years ago."

The NMTC is an excellent venue to rebuild technical proficiency for all our maintenance elements as well as brigade support battalion and forward support company distribution



*Army Special Forces Soldiers climb rope ladders on the Nasty Nick obstacle course at Camp Mackall, N.C., Feb. 25, 2013. (Photo by Spc. Melissa C. Parrish)*

# 5S Workplace Organization Applied to Facility Management

■ By Capt. Adam E. Stickley

**T**he 5S workplace organization method is the foundation of the lean manufacturing strategy that emphasizes eliminating waste while delivering quality products with greater efficiency. This article details how applying the 5S system (sort, set in order, shine, standardize, and sustain) transformed supply and warehousing functions at Camp Mackall, N.C., a training facility for the John F. Kennedy Special Warfare Center and School (SWCS) at Fort Bragg, N.C.

The article discusses the terminology, methodology, and practical application of 5S.

## Freedom Training Facility

The SWCS manages and resources professional growth for Soldiers in the Army's three special operations branches: Special Operations Forces, civil affairs, and military information support. The 3rd Battalion, 1st Special Warfare Training Group (Airborne), is the home of civil affairs training for the SWCS and the

Army. The battalion's C Company is responsible for field skills training and provides logistics support to other 3rd Battalion companies for field training.

The company is responsible for maintaining and expanding the battalion training facilities. The Freedom Training Facility at Camp Mackall is the battalion's primary location for field training. The facility has an urban reaction facility, a forward operating base, patrolling areas, and a village that simulates

conditions in economically developing nations. About 3,000 Soldiers train annually at the facility.

In 2011, the Army began expanding its Reserve component civil affairs structure by adding a brigade to meet the expected increased demand for civil affairs support by 2013. In 2010, the Army Reserve began adding a brigade to bring its civil affairs companies from 112 to 132 by 2012. The increased training requirements for C Company required the expansion of the Freedom Training Facility.<sup>1</sup>

its roots in automotive production as early as 1910 with Henry Ford's manufacturing system used to produce the Model T. Corporate executives worldwide were exposed to the concept in 1990 with the publication of *The Machine That Changed the World* by James P. Womack, Daniel T. Jones, and Daniel Roos. The book details Toyota's lean production system that serves as the basis for its success.

Lean production focuses on driving waste out of the work cycle. Lean practitioners seek ways to accomplish

so, seiketsu, and shitsuke. The English translations are sort, set in order, shine, standardize, and sustain.

5S is a simple tool for organizing a workplace in a clean, efficient, and safe manner in order to enhance productivity and ensure the introduction of standardized processes.<sup>4</sup> Each step decreases waste and increases the ability of the operator to complete a task to the standard or quality the customer desires.

**Sort.** This step removes all items not necessary for the current operations. Some companies conduct "red tagging." This process identifies questionable items and places a red tag on them. If the tagged item is not used after a few days or weeks then it is deemed not essential.

**Set in order.** This step organizes a work area for maximum efficiency. Organization and orderliness work best when implemented together. Set in order means arranging items so that they are easily accessible and labeled. Labeling is mostly for others who need to know what is in the area when the area owner is away.

**Shine.** This step is what most people think of when they hear 5S mentioned. This is the step in which operators clean the workstations. Cleaning the workstation not only removes defects but also leaves the site ready for work at any time.

**Standardize.** All procedures should be consistent and standardized so that employees complete specific functions in the same manner. Workstations for like functions should be identical. Since everyone has a different perspective on what is clean, standards for cleaning are created during this step.

**Sustain.** This step requires self-management and auditing from inside and outside the organization. The idea is to maintain the progress and continue to evaluate the process

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## Lean production focuses on driving waste out of the work cycle. Lean practitioners seek ways to accomplish more with less time, space, equipment, people, and resources.<sup>2</sup>

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The village at the training facility became the temporary site of the C Company headquarters. The village sat on nearly 12 acres of pine forest and had 12 buildings and some smaller structures. Plans called for as many as 20 buildings, sleeping areas for 80 role players, and a facility management operations area.

Before C Company, which was formally established in April 2011, took over the training facility, one person managed it for five years with an annual budget of only \$80,000—barely enough to cover the facility's maintenance. Since C Company took over, the battalion has spent nearly \$5 million in upgrades and completed more than \$900,000 worth of troop labor projects.

### Lean Manufacturing

The concept of lean manufacturing was made popular in the 1980s by the Toyota Motor Corporation but has

more with less time, space, equipment, people, and resources.<sup>2</sup>

According to the Lean Enterprise Institute, "the core idea is to maximize customer value while minimizing waste. Simply, lean means creating more value for customers with fewer resources. Eliminating waste along entire value streams, instead of at isolated points, creates processes that need less human effort, less space, less capital, and less time to make products and services with far less costs and with much fewer defects, compared with traditional business systems."<sup>3</sup>

Lean is a way of thinking. The tools specific to manufacturing may not all apply directly to service industries; however, some translate fluently. One of the most powerful Lean manufacturing tools, and a cornerstone of any successful implementation, is 5S, which stands for the Japanese words seiri, seiton, sei-

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<sup>1</sup> "Report to Congress on Civil Affairs," Office of Assistant Secretary of Defense for Special Operations, Low Intensity Conflict and Interdependent Capabilities, Washington, D.C., April 29, 2009, p. 8.

<sup>2</sup> Donna C. Summers, *Quality*, 5th ed., Prentice Hall, Inc., Upper Saddle River, N.J., 2009.

<sup>3</sup> "What Is Lean?" [www.lean.org](http://www.lean.org), accessed on Jan. 1, 2012.

<sup>4</sup> Ibid.

for waste. Many companies regularly audit their processes to ensure the employees are still adhering to 5S principles.

### Training Facility Problems

The problems facing the training facility and its management included a lack of established systems for storage, nonstandard repairs, the overuse of the site for storage, and an abundance of stock materiel.

Before implementing 5S, all supplies were delivered to the facility manager's office. Large amounts of materiel were unloaded into several cleared areas used as lay down yards—areas to stage equipment and supplies for future projects. Smaller or expensive items were unloaded into one of eight shipping containers. However, items were placed randomly into the containers. Often, completing a single project involved looking through all eight containers to find the necessary materiel.

Also, materiel was purchased in bulk or recycled from previous building projects. Materiel and tools were often moved several times because of the inability to store those items at the building site. This caused redundant efforts, damage, and loss of accountability.

At one time, nearly \$500,000 worth of construction materiel was on the ground and in the containers. Only about \$200,000 worth of the materiel was slated for projects within the next six months. About \$300,000 worth of goods were simply in the way, rotting, rusting, or generally losing value and costing money and effort to store.

Standardized procedures had not been established for facility maintenance. Many of the Soldiers had no construction training and learned on the job. Soldiers did their best to make necessary repairs, but this approach meant that repairs were not standardized.

### Transforming the Facility

Applying 5S to the facility and its operations started with a plan-

ning phase followed by an execution phase.

**Sort.** The plan was to remove all materiel from the shipping containers and the lay down yard. Unneeded materiel was to be recycled, given away, or thrown away. We allocated two weeks to this step based on the assumption that we would continue to sort as we found more materiel during the second and third steps.

This was a very large task. Nearly a decade's worth of materiel was lying around the facility. The crew started by designating areas for materiel based on its destination. Areas were marked for landfill materiel, recyclables and metals, hazardous waste products, and materiel to be returned to the supply system. Dumpsters were ordered for the landfill materiel, and sites were prepared for hazardous materials handling and shipment.

During this step, four 40-cubic-yard dumpsters of cement debris, nonrecyclable plastics, and rotting wood were taken to the landfill. About 30,000 pounds of scrap metal was recycled. About 300 gallons of hazardous waste was removed. About 100 used light bulbs containing mercury vapors were removed. Salvageable wood was set aside and

stacked according to dimensions and grade. The shipping containers were emptied.

**Set in order.** Shipping containers were assigned for each of the major items—construction and grounds tools, expendable and seasonal items, doors and windows, bulk construction materiel, plumbing and electrical goods, and repair parts. Containers were organized using shelves and dividers. Hazardous products were placed in fireproof lockers.

Materiel in the lay down yards was staged in groups of like materiel. For example, red metal siding was placed with red metal corners and trim. Commonly used materiel was placed toward the front of the lay down areas while materiel not often used was placed at the back.

As the lay down yards were organized, we recognized the need for shelter for some materiel and began requesting approval to erect a permanent cover. Once the permanent cover was in place, shelves were installed to reduce the size of the lay down area and the related congestion. This reduced materiel damage.

During this process more unneeded materiel was found. Redundancies in materiel were noted and lost materiel was recovered. Stock-



*A storage container is organized using shelves and dividers at Camp Mackall, N.C. Before the transformation of the facility's supply and warehousing functions, items were unloaded randomly into one of eight containers and completing a single project involved looking through all eight containers to find the necessary materiel.*



*Tools are displayed in an orderly and standardized manner in a storage container at Camp Mackall, N.C., a training facility for the John F. Kennedy Special Warfare Center and School at Fort Bragg, N.C. Soldiers transformed the facility's supply and warehousing functions by applying the 5S workplace organization method.*

piled expensive building materiel was stored until ready for use. The facility manager's office inventoried all materiel. A map of the containers and lay down yard is on display in the office.

**Shine.** The shine step came easily. After discarding or recycling most of the materiel, it was easy to get in and clean house. By this time, the Soldiers were actually excited about it. They saw what their hard work was starting to create and did not need much motivation to get out and clean the facility.

**Standardize.** In this step, we created individual kits for common tasks. Tools were placed in bags or boxes related to a specific task. Standardizing the kits was a very practical approach. It had already proved itself as a great time saver when preparing for common tasks.

An example of a kit we designed is the environmental control unit kit. We knew from experience that we had power surges at the forward operating base where the students slept. These surges caused the air conditioners to start simultaneously, creating a voltage drop that blew the start capacitors.

To replace a capacitor, the mechanic needed a new capacitor, a jumper wire, a testing stick, and replacement screws. We combined these items in a tool bag, which reduced the need to search for each item individually before starting the repair. It also allowed us to stage a few of these kits near the sleep tents, making them easily accessible.

The tool bags helped in expediting repairs and ensure mechanics use the proper tools. The Soldiers worked on a training system and standard operating procedures for common repairs. Once finished, they will be published so that all tasks are completed to the same standard.

The eight containers were also standardized by placing the lights in similar locations, keeping brooms and dustpans just inside the doors, and posting inventory lists inside the doors. When possible, all containers were organized with a common theme of item placement.

**Sustain.** To sustain our efforts, we created site maps for each area. Pictures were taken of each site and posted to show the Soldiers how the areas should look daily. This gave the Soldiers a model. The intent was to

establish self-sufficiency by educating the Soldiers and indoctrinating them in the process. The goal was to empower the Soldiers to keep up the process and to continue to improve.

Excess materiel is inventoried and used before more of the same product is ordered. The facility manager established a database of stock numbers based on historical and projected use. In an effort to cut down on the habit of storing items "just in case," no space has been allocated for unusable materiel.

Materiel ordered commercially is now assigned a purchase order number associated with a specific building project. The materiel is stored on the building site. This has reduced multiple movements of the same freight. It has also reduced the amount of the misplaced materiel. The C Company commander periodically inspects the areas to ensure the standards are met.

The application of Lean manufacturing principles and 5S has transformed the process of facility maintenance and project management for C Company. The process has saved the Army money, labor, and resources.

The transformation has been an eye-opening experience that has caused ripple effects in the company's efficiency and in its training mission. Soldiers are faster and more accurate when dealing with problems, and attitudes are improved. C Company is providing a better quality product for its customers through the implementation of Lean manufacturing principles and 5S.

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“Today DOD is one of only two major agencies that has never had a clean audit opinion on its financial statements.

That is inexcusable, and it must change.”

—Department of Defense Secretary Leon E. Panetta, October 2011

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## Audit Readiness: Sustaining the Army’s Strength

All of the Defense Department’s financial statements are required to be auditable by fiscal year 2017. The Army is preparing its organizations to meet that deadline.

■ By William Roberts

A hand-receipt holder signs off on an inaccurate physical inventory of his property books. A supply technician authorizes property movement without authority. A property book office cannot produce supporting documents for transactions conducted within its organization. A unit does not maintain an updated command supply discipline program.

What do all of these scenarios have in common? They stand in the way of the Army achieving its first clean audit opinion. Having a clean audit opinion means that the auditor did not have any significant reservations about information contained in the

organization’s financial statements.

Every time Army personnel order, move, or use equipment and supplies, they have an impact on the Army’s financial statements. All Army personnel may not understand how asset management at the installation level affects the Army’s financial statements, but that is about to change.

### Leaders Have Spoken

In a testimony to the House Armed Services Committee in October 2011, then Department of Defense (DOD) Secretary Leon E. Panetta said, “Today DOD is one of only two major agencies that has never had a clean audit opinion on its financial

statements. That is inexcusable, and it must change.”

Army leaders are fully behind the effort to achieve audit readiness. Both the Chief of Staff and Vice Chief of Staff of the Army have sent messages to general officers on the importance of improved financial management and audit readiness.

Army Chief of Staff Gen. Raymond T. Odierno, through an April 16, 2012, General Officer Management Office message, said, “Leaders at all levels are responsible for instilling proper levels of discipline and oversight into all business processes within their command. The processes span all functional areas

of our Army—resource management, acquisition, personnel, and logistics. Auditability is not just a Comptroller function.”

On the same day, then Vice Chief of Staff of the Army Gen. Lloyd J. Austin III sent a message through the General Officer Management Office specifically about property accountability. He stated, “Everyone in the Army is responsible for accounting for assigned property and other resources. By effectively accounting

achieve audit readiness. The Army’s goal is to have mission-critical assets and asset records ready for independent audit by December 2013. A plan is in place, and the Army is actively supporting commands and installations in this transition to a new way of doing business.

### **The Plan to Achieve Audit Readiness**

Under the leadership of the Assistant Secretary of the Army (Financial Management and Comptroller),

the assets it maintains are complete. The Army also verifies this assertion through a book-to-floor test.

Before an E&C assertion, the Army needs to test the internal controls involved within its property accountability environment, identify where deficiencies exist, and then implement and complete corrective actions. Internal controls are policies and procedures put into place to safeguard the integrity of Army finances, operations, and information systems.

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“Commanders are accountable for the proper execution of business processes, including the associated internal controls and the overall audit readiness in their organizations.”

—Secretary of the Army John M. McHugh

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for our property we will ensure we are responsible stewards of tax payer dollars. This will ultimately enable a stronger and more capable Army.”

Soon the Army will test internal controls to hold commanders accountable for ensuring those controls are in place and operating effectively.

In a recent memo, Secretary of the Army John M. McHugh said, “Commanders are accountable for the proper execution of business processes, including the associated internal controls and the overall audit readiness in their organizations.” He also said that the “Army will review monthly scorecards and hold quarterly meetings with commanders to ensure continued progress toward financial improvement.”

Congress has mandated that all of the DOD’s financial statements be auditable by fiscal year 2017. In fact, in September the Senate introduced a bill that would penalize the DOD for not meeting its audit goals. Penalties range from stricter reporting requirements to halting any new weapon systems past the research and development stage.

Asset management accountability is a key component for the Army to

the Army is focusing on the following three priorities to achieve an auditable state:

- Improving the budget execution processes that affect the statement of budgetary resources.
- Verifying the existence and completeness (E&C) of mission-critical assets and asset records.
- Maximizing the investment in enterprise resource planning systems, such as the Global Combat Support System—Army.

### **E&C Assertions**

When the Army asserts the existence of mission-critical assets, it states that it has a reasonable assurance that the assets reported in its information systems actually exist. The Army verifies this assertion through an independent audit organization, which traces an asset from the Army’s information systems to its physical location in a motor pool, flight line, or storage facility. Auditors commonly refer to this as a “book-to-floor” test.

When the Army asserts the completeness of mission-critical assets, it states that it has reasonable assurance that the records pertaining to

### **E&C of Mission-Critical Assets**

The Army’s E&C assertion of mission-critical assets covers various asset classes. Two of the main asset classes that directly affect logisticians are military equipment and general equipment (ME/GE) and operating materials and supplies (OM&S).

ME/GE includes class VII (major end items) assets with a unit acquisition cost of \$100,000 or more. ME includes ships, aircraft, and combat vehicles. GE includes materials-handling equipment, training equipment, special tools, and test equipment. The Army reported more than \$122.1 billion of ME/GE assets on its fiscal year 2011 financial statements.

OM&S covers class V (ammunition) assets. The Army reported more than \$31.1 billion of OM&S assets on fiscal year 2011 financial statements.

### **Audit Readiness Team Visits**

In preparation for the Army E&C assertion in December 2013, audit readiness teams are visiting Army, Army National Guard, and Army Reserve organizations and installations. The teams are documenting business processes, testing internal controls on processes that contribute information to the financial statements, and providing corrective actions to address weaknesses within the processes. Audit readiness teams coordinate with internal review, supervisory auditor, mission support element, G-4/S-4, and directorate of logistics offices to arrange site visits

and implement and report corrective actions.

Property accountability inefficiencies at the local level compound to create material weaknesses across the Army and prevent the creation of reliable and accurate financial statements. Without an accurate understanding of our resources, we cannot properly plan for the future and we have more difficulty justifying funding from Congress.

The Army must be able to prove it is a responsible steward of taxpayer dollars through a financial audit. As mentioned, Congress is considering penalties that include withholding funds for weapon systems if the Army cannot obtain a clean audit opinion of its books.

### Key Improvement Areas

At the more than 150 installations and locations maintaining Army property, improvements to internal controls should be made in physical inventory accuracy, property lifecycle transaction completion, standard operating procedures, quality assurance reviews, and warehouse safeguarding.

**Physical inventory accuracy.** Accurate physical inventory of assets and complete transaction documentation ensure that asset records accurately depict a unit's property and that the Army has assurance of its assets.

Accountable personnel should ensure a three-way match during a physical inventory of assets. The accuracy and consistency of asset serial numbers and data elements (as reported within the Property Book Unit Supply Enhanced [PBUSE] system), asset supporting documentation, and the asset itself should all match. Where appropriate, accountable personnel should submit a Department of the Army Form 4949, Administrative Adjustment Report, along with a PBUSE update with correct data. Personnel should update supporting documentation to reflect any changes to that form.

Assets deemed "found on instal-

lation" and "not found on installation" should be processed through the appropriate procedures to reflect an accurate property book. This may entail closing pending transactions in PBUSE, processing a receipt form for an asset, or completing a financial liability investigation of property loss.

**Property lifecycle transaction completion.** Accurate, complete, and authorized property movement ensures recorded transactions represent actual events, reducing the Army's exposure to loss of assets and potential misstatements.

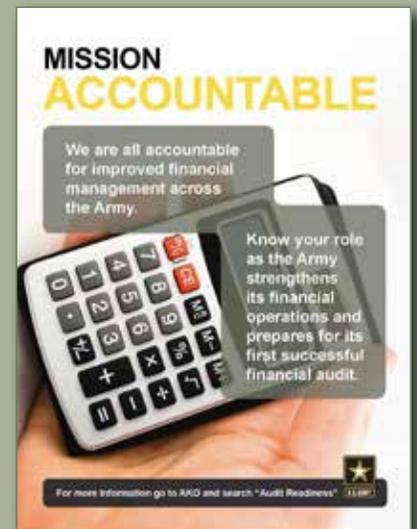
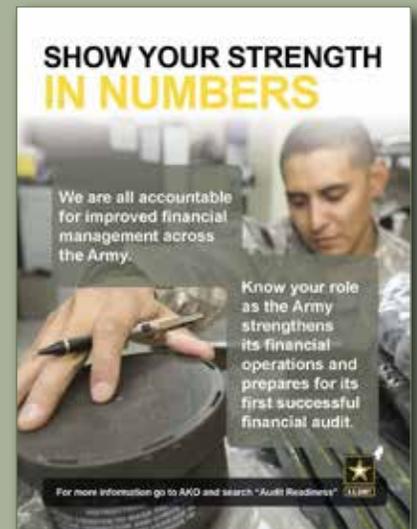
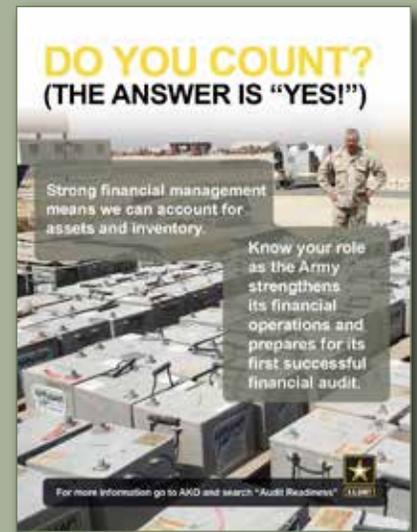
Property book officers (PBOs) should establish processes to reconcile transactions that are due-in and those that are deemed as pending within PBUSE. When an organization has received and accepted transactions, the PBO should process and close the transaction within PBUSE according to timeframes listed in Army Regulation (AR) 710-2, Supply Policy Below the National Level.

PBOs and property control custodians should record when a transaction document is received with a stamp that includes the date and initials of who received the document.

PBOs and asset property managers should engage hand receipt holders in increased training and process discipline to ensure that all supporting documentation is filled out accurately and completely and is signed by authorized personnel.

PBOs should ensure the commander or delegated individual signs appointment orders. Each command must establish segregation of duties to mitigate potential asset misstatements. All members of the property chain should use consistent signatures (either manual or digital).

PBOs should update document retention policies to retain initial purchase documents for capital assets permanently and documents supporting accounting records for a minimum of six years, as outlined in AR 710-2. PBOs should substitute any missing documentation with a statement that includes all informa-



*The Army is promoting audit awareness through a series of informational posters.*

tion recorded in the document register for the lost document. The PBO should sign the document.

**SOP documentation.** Documenting policies and procedures of the organization in a standard operating procedure (SOP) ensures consistency in proper classification and accounting principles from period to period.

A unit supply SOP should outline the following:

- The responsibilities of unit supply personnel.
- The kinds of records, reports, and forms required.
- Detailed procedures for requesting, receiving, storing, inventorying, issuing, and turning in supplies and equipment.
- Procedures for initiating adjustment actions for lost, damaged, or destroyed items.

Organizational SOPs should be accessible and reviewed annually to ensure they follow U.S. generally accepted accounting principles and ARs. The approval authority should review, sign, and date the SOP at regular intervals.

**Quality assurance reviews.** Quality control programs ensure the accuracy of property records during periods of time between inventories.

The Army has established quality assurance processes through its command supply discipline program (CSDP). When implemented properly, the CSDP provides reasonable assurance of property accountability, asset record accuracy, and adequate documentation supporting all transactions.

Organization leaders and PBOs should implement CSDP evaluations within their organizations. Organizations should document CSDP results and resolve findings in line with AR 710-2, Appendix B. The frequency of CSDP evaluations should conform to Appendix B, Table B-7.

**Warehouse safeguarding.** The use of appropriate safeguarding ensures controlled access to assets, critical forms, records, processing, and stor-

age areas. It also provides greater certainty that recorded assets exist on a given date.

Accountable personnel should ensure the warehouse SOP contains procedures for segregating duties, securing property, and preventing fraud, waste, and abuse. Where appropriate, all personnel not assigned to the warehouse should sign in and be escorted.

All gates and doors should be secured during nonbusiness hours. Sensitive items should be kept in locked cages, and lockers should be located within a locked fenced area. Accountable personnel should secure pilferable equipment located outside the warehouse or keep it in secured containers. Organizations should use a key control log to account for all locker, cage, fence, and entry door keys.

### **Audit Readiness Support**

The audit readiness team has developed a suite of resources to ensure commands and installations are following business processes to audit-ready standards.

**Overview and business process training.** Classroom and virtual training modules are available and cover internal controls in detail. Find virtual training on the Army Learning Management System by searching for “audit readiness.” Currently, the ME/GE business process module is available, and one for OM&S is coming soon.

**Audit readiness site.** The Army Knowledge Online (AKO) audit readiness site features audit readiness resources and site visit schedules. Log into AKO first and then go to <https://www.us.army.mil/suite/page/auditready> or search “audit readiness.”

**Audit Readiness Command and Installation Guide.** This guide, available on the AKO audit readiness site, provides a description of key supporting resources available to commands and installations for becoming audit ready. It also includes a description of key internal

control activities identified for each command and installation and the authoritative guidance and policies requiring the internal control activities. The guide discusses the common internal control deviations discovered by Army audit readiness teams during discovery and testing site visits.

**Financial Improvement Plan.** The Army provides regular updates to business process owners through a quarterly report called the Financial Improvement Plan. It provides updates on audit readiness activities, information on upcoming training, and other current financial management topics.

“Responsible stewardship of taxpayer resources and operating business processes within an effective control environment are consistent with high standards of military readiness and support Army values,” said Gen. Odierno in his April message to general officers.

The effort for the Army to become auditable is about more than just receiving a clean opinion. When we better manage Army resources, Army leaders can rely on accurate and timely financial data to make better informed decisions, especially in tight fiscal times.

A clean audit opinion shows we are accountable to taxpayers and better justifies future funding requests to Congress. Efficiently managing our resources allows us to better support our Soldiers and their missions.

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William Roberts is the director of general fund audit readiness for the Army under the Office of the Assistant Secretary (Financial Management and Comptroller). He has a bachelor’s degree in accounting from Hampton University.

*We welcome your comments on this or any other sustainment-related topic. Email [usarmy.lee.tradoc.mbx.leeasm@mail.mil](mailto:usarmy.lee.tradoc.mbx.leeasm@mail.mil).*

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“Integrating contracting into intelligence, plans and operations can serve as a force multiplier in obtaining our campaign objectives.”

—Gen. John R. Allen, U.S. Marine Corps  
 “Counterinsurgency (COIN) Contracting Guidance”  
 September 18, 2011

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# Operational Contract Support Planning: Evolution to the Next Level

Embedding operational contract support planning capability into each Army service component command may be the key to filling contracting gaps in the current force structure.

■ By Lt. Col. John M. Cooper

The conflicts in Iraq and Afghanistan, along with smaller operations, took a little known and often overlooked Army support function and placed tremendous responsibility on its shoulders. Over the past decade, Army contracting, along with its joint siblings, has played a more prominent role in the way the Army plans and conducts military operations and logistics support.

In 2007, more than half of U.S. personnel in Iraq were contractors.

The proportion of contractors supporting U.S. forces in Afghanistan is nearly identical. The Army has become reliant on contractors and that reliance may grow as the Army downsizes and stresses its already lean sustainment capabilities.

## Operational Contract Support

The Army responded to the influx of contractors by establishing, growing, and maturing its contract management capability and implementing the operational contract support

(OCS) concept within units. While the OCS concept takes the Army in the right direction, additional organizational solutions may be required to better integrate contract planning, build contracting as a core capability, and bridge the gap between the supporter and the supported.

The Army's present force structure and approach to OCS continues to overlook significant capability gaps and key tasks at the broader operational level. The Defense Department's Initial Capabilities Doc-

ument for Operational Contract Support, dated July 19, 2011, provides a detailed list of OCS shortfalls above the tactical level. Included in that list are several operational capability gaps that the Army is challenged to correct with the current force structure:

- A lack of OCS integration into capability and task planning, operational assessments, force development, and lessons learned.
- A lack of synchronized OCS planning across all operational phases and among joint, multinational, and governmental and nongovernmental agency partners.
- Insufficient assessment of regional contract capacity, the extent of existing contracts, and common-user contract support for key commodities and services.
- A lack of centralized oversight to identify risk and recommend policies to control and monitor contractors on the battlefield.
- Insufficient expertise among senior planning staffs to enable the generation of synchronized, acquisition-ready requirements documents.
- Insufficient awareness and appreciation of OCS significance and complexity, hampering the ability to make full use of OCS in the operational environment.

### Formal OCS Implementation

The Army implemented OCS in doctrine, such as Army Tactics, Techniques, and Procedures 4–10, Operational Contract Support Tactics, Techniques, and Procedures, with a strong emphasis on execution at the tactical, rather than operational, level. One Army OCS solution included creating a non-acquisition force structure to support requiring-activity functions, such as developing contract requirements, preparing performance work statements, and contracting officer representative management. Positions that perform those functions have the additional skill identifier (ASI) 3C.

Similarly, military occupational specialty (MOS) 51C contingency contracting officers (CCOs) are tasked to provide unit-level training and contracting support, execution, and management for the supported element. Despite education efforts, confusion lingers regarding the delineated roles and responsibilities of ASI 3C and MOS 51C personnel, indicating that OCS is not fully understood as a concept or task within the operational or acquisition communities.

Regardless, this Army OCS solution focuses on tactical-level problems associated with the requirements development and contract management phases of the contract life cycle. Although the solution has tremendous value in ensuring taxpayer dollars are well spent, the current OCS concept does little to address OCS-related planning and effects at higher levels.

Within the last 10 years, the Army contracting community extracted itself from operational units to create separate contracting organizations. That structure currently includes 108 contingency contracting teams (CCTs) and 17 contingency contracting battalions (CCBNs) organized primarily to support tactical commanders at the division level and below. Seven contracting support brigades (CSBs) are committed to theater commanders and two additional rotational brigades are activating with alignment to corps headquarters.

### Contingency Contracting Teams

The foundational unit for contracting is the CCT, which is charged with supporting maneuver and sustainment brigades, the division and corps headquarters, and myriad other units operating within an assigned support area. The CCT comprises five CCOs awarding contracts under explicit written authority.

Most of the Army's deployable contract writing capacity resides within the CCTs. The team works hand in hand with the supported unit's ASI 3C-qualified personnel

and the supply or service end user throughout the full life cycle of a contract, including requirements development, training, monitoring, acceptance, and final payment.

The CCT leader engages the supported commander and staff to synchronize and leverage contracting within operations. Early and consistent involvement in the unit's planning and execution cycle ensures contracting maintains a proactive, solution-oriented posture to enhance the commander's mission. Ultimately, CCTs are concerned with satisfying immediate requirements, contract management, and providing tactical commanders with critical tools to expedite urgent, low-cost requirements, such as the field ordering officer program.

### Contingency Contracting Battalions

Contracting's initial level of command resides at the CCBN. Unlike the CCTs, the 13-person CCBNs are mission command headquarters, not contract-writing organizations. The CCBN is generally aligned with a supported division, directing approximately six CCTs supporting the division area. A CCBN is also aligned with each Army corps headquarters to provide equivalent command and control to subordinate CCTs within the corps area.

The CCBN implements, monitors, and assesses the effectiveness of higher-level contracting policies and procedures, ultimately providing feedback to commanders. Vested with greater authority and responsibility, the CCBN commander reviews select solicitations and contracts to ensure compliance with policies, guidance, and service regulations.

As contract administration is historically a high-risk and poorly performed task for the Army, the CCBN commander and staff provide critical contract management oversight within the CCTs, ensuring contracting officers and unit representatives are properly monitoring contractor performance, accepting supplies and services, and

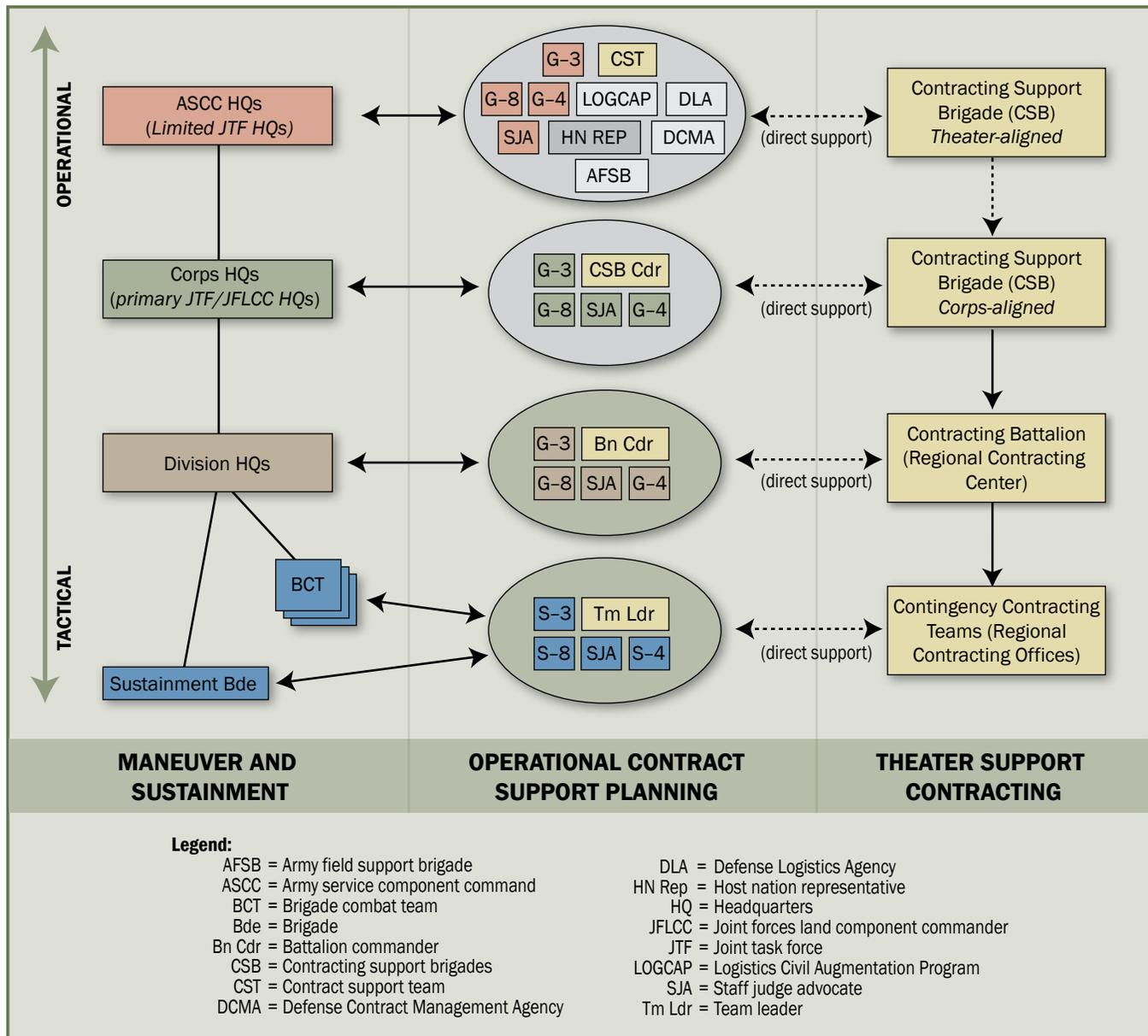


Figure 1: Operational contract support from the tactical to operational levels.

paying and closing contracts.

Finally, the CCBN commander must bridge many of the aforementioned capability gaps at the division level by directly engaging the division planning staff. This ensures that contracting is appropriately used and synchronized within tactical plans and that contracting officers within the CCTs have sufficient warning to act quickly on emerging requirements.

### Contracting Support Brigades

The next level of command is the CSB, which can be either the-

ater committed and aligned with an Army service component command (ASCC) or rotational and aligned with an Army corps headquarters. The CSB commander typically serves as the senior contracting official within a theater or Army corps area and, as such, the 24-person CSB's primary functions include the following:

- Plan and execute contract support for a supported theater or command.
- Establish and maintain contracting policies, procedures, and priorities

to support operational objectives.

- Train, develop, and warrant contracting officers.
- Ensure contracts and other transactions comply with applicable policies, regulations, and public law.

The CSB also provides mission command to subordinate CCBNs and CCTs as well as to joint contracting partners when the Army is designated as the lead service for contracting during an operation.

Like their subordinate leaders, CSB commanders must engage with

supported commanders and staffs. Understandably, consistent involvement in operational planning with any level of detail becomes a significant challenge at senior levels where mission complexity and the number of supported units increase dramatically. The CSB, particularly a theater-committed organization, can quickly become overtaxed, lacking sufficient depth to provide dedicated planning assistance to senior headquarters.

### An Organizational Solution

The Army requires a more robust

organizational evolution to address the identified capability gaps. Sufficient structure presently exists at the tactical level to provide sound OCS support and planning assistance to division and brigade staffs. Even within the Army corps area, there is sufficient redundancy among the CSB, CCBN, and CCT to enable OCS engagement for major units, such as the expeditionary sustainment command.

However, OCS capability erodes considerably at echelons above corps, where significant operational planning occurs, particularly with

respect to the development of theater-unique contingency plans, crisis action plans, and shaping or theater security cooperation missions. This decreased capability directly correlates to the six identified capability gaps; therefore, a solution is required to resolve gaps and capability shortfalls within the ASCC.

The Army should develop, activate, and resource a contract support team (CST) comprising three experienced contracting officers within each ASCC headquarters. This team would be assigned to a corre-

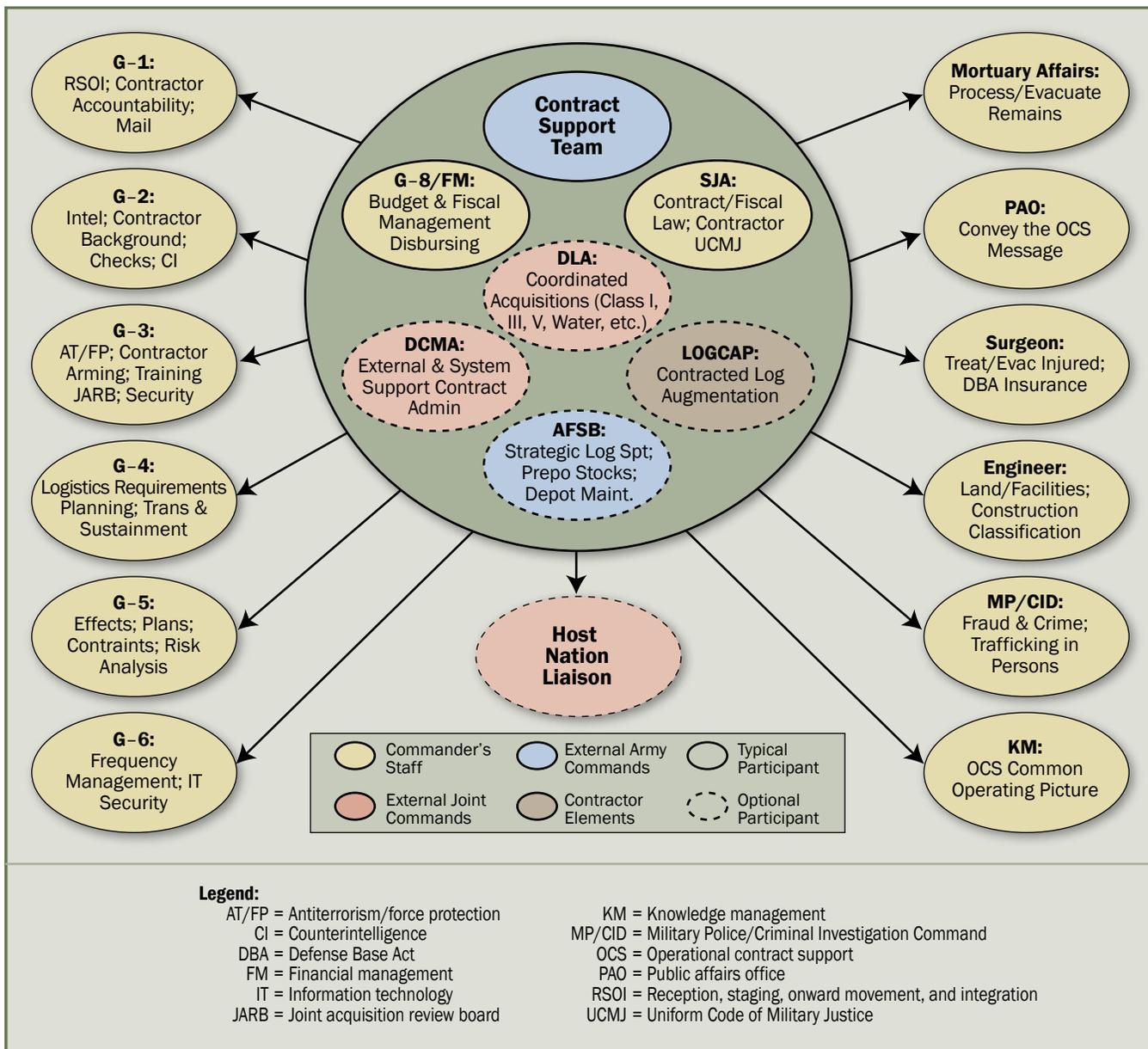


Figure 2: OCS planning team and staff responsibilities and interaction. (Image courtesy of retired Army Lt. Col. George Holland)

sponding CSB, which would allow the team to maintain a strong link to the contracting community and would permit the CSB commander to select the best-qualified officers for this assignment.

A three-person team would facilitate 24-hour contingency operations, with a senior field grade officer and senior noncommissioned officer during the day shift and a company grade officer monitoring activity during the night shift.

The team would become an integral part of the supported commander's headquarters, but its placement within that headquarters may be unconventional to many. The contracting function is historically associated with the G-4 section since it is considered a logistics enabler, particularly at the tactical level. However, placing the OCS planning team within the ASCC G-4 may not be the ideal solution.

Each staff section has some contracting equities and bears some responsibility for indoctrinating, managing, providing for, and interacting with contractors. Aligning the team within the G-3/5 rather than the G-4 provides the best vantage point for emerging operations as desired end states, branches, sequels, and requirements are developed. Ultimately, this allows the team to coordinate with other planners and eliminates functional stovepipes and situations where contracting is simply used to manage incomplete or untimely requirements.

The CST focuses on theater-wide, macro-level contracting issues, rather than tactical, micro-level contracting issues executed by CCT or CCBN leaders at the brigade or division level. The CST's mission is not to write or directly manage contracts. Instead, the team concentrates on six fundamental tasks:

- Establish a foothold within the ASCC planning staff to foster relationships and educate the supported organization.
- Actively participate in the ASCC's planning process to leverage and

integrate contracting, guide decision making, develop planning documents, and conduct OCS-related intelligence preparation of the operational environment.

- Develop contracting policies and procedures to enable the commander's mission.
- Act as the common link for various contracting activities within the theater.
- Identify operational problems and develop comprehensive contracted and noncontracted solutions.
- Articulate contract-related risk and develop mitigation strategies.

While the CST assists in plan development and addresses operational concerns at higher levels, the CCBN and CCT perform similar functions and provide technical advice locally to their supported commanders. This leads to the desired end state, with contracting collectively assessing operation feasibility, guiding decision making, and proactively finding solutions at all levels to support the commander's mission.

### The Six Tasks of the CST

Let us further explore the CST's six fundamental tasks.

**Establish a foothold within the ASCC planning staff.** The CST's first task is to establish itself within the ASCC planning staff to enable habitual interaction and greater education regarding contracting capabilities and challenges.

Presently, the ASCC staffs have insufficient OCS expertise and the aligned CSB is not sufficiently resourced to accommodate sudden activation and deployment of a contingency command post. Should a major contingency event occur, there would be a delay while the Army contracting community identified, organized, and placed experienced, capable contracting personnel in the operational headquarters.

This occurred in Iraq, where contract planning was only marginal until the ad hoc Joint Contracting Command-Iraq/Afghanistan (JCC-

I/A) was created, contracting unity of effort was established, and CCOs began engaging the various headquarters. Pre-positioning a CST within each ASCC eliminates any delays, establishes relationships, and overcomes the aforementioned capability gaps.

**Actively participate in the ASCC's planning process.** The CST's next task is to actively participate in operational planning. This enables the team to guide decision making, identify shortfalls early in the planning cycle, assist in developing appropriate contracted and noncontracted solutions, and then provide key intelligence to contracting leaders, enabling them to complete preparatory work to reduce acquisition lead times.

Active participation is particularly critical when operations drive major acquisitions, such as establishing forward operating bases. This was a challenge during the Iraq surge when JCC-I/A and the Logistics Civil Augmentation Program (LOGCAP) played critical roles. Contracting maintained a position on the fringe of operational planning, resulting in suboptimal advance notice, synchronization, and operational input.

Embedding the CST overcomes that challenge while permitting routine preplanning for region-specific contingencies, assessing local supply and service capabilities, and planning how to best employ high-demand, low-density contracting personnel.

**Develop contracting policies and procedures.** In some cases, the solution to an operational problem may be a change in policies or procedures. In coordination with the CSB commander and staff, the CST assists and guides the supported commander in establishing command-specific, contracting-related policies and procedures. The team provides subject-matter expertise to ensure those policies and procedures comply with acquisition regulations, do not conflict with CSB policies, support the operational end state, and are executable by CCOs in the field.

As an example, JCC-I/A and Multi-National Force-Iraq imple-

mented the Iraqi First program as policy, directing CCOs to give preference to Iraqi-owned businesses as a way of achieving the operational objective of improving local-national employment and reducing foreign business intrusion.

Alternatively, establishing acquisition boards, such as the Joint Acquisition Review Board, is a procedural option to ensure requirements are actionable, properly staffed and prioritized, and possibly consolidated to benefit from economies of scale.

*Act as the common link for various contracting activities within the theater.* The CST also serves as the headquarters' common link to external organizations and LOGCAP personnel to ensure that requirements and contract support are synchronized, feasible, and suitable.

External contracting activities might include the CSB, Army field support brigade, Defense Contract Management Agency, and Defense Logistics Agency. Host-nation civil or military representatives may also be consulted regarding acquisition and cross-servicing agreement options. Ultimately, the CST acts as the hub for synchronizing the contracting effort.

*Identify operational problems and develop comprehensive solutions.* After identifying an operational problem and building relationships among stakeholders, the CST can execute its next task of developing comprehensive contracted and non-contracted solutions. Positioned as the command's link to external contracting enablers, the team expands the number of options for the supported commander.

Deploying military sustainment or

engineer assets may be a more timely and cost-effective noncontracted solution for a short-duration mission. Activating LOGCAP to manage a seaport or to provide longer-term life support for U.S. forces may be a viable contracted option using U.S. or third-country nationals. While LOGCAP may be one solution for reasons of scale, scope, or complexity, deployed CCTs may be able to execute similar contracts using local nationals to achieve the same support, but with different operational effects.

The team can also tap into capabilities outside of the theater, such as the Army Materiel Command's Rock Island Contracting Center, which provides reach back support to purchase urgently required supplies for contingencies from the United States. Likewise, the General Services Administration, Defense Logistics Agency, Army Corps of Engineers, and others maintain a contingency response capability. Fostering effective multi-agency communication to find suitable solutions to operational problems is an essential team function.

*Articulate contract-related risk and develop mitigation strategies.* Finally, regardless of the environment or mission, the CST identifies, assesses, and plans to mitigate contract-related risk at the operational level. Contract-related risk is associated with a sudden influx of U.S. military buying power in an immature or austere marketplace. This influx can lead to a false economy, cause rampant inflation, and create an economic dependency on U.S. spending—each of which can have a catastrophic impact on the local populace and the host-nation economy.

Another risk is that funds used to pay contracts will be channeled to fund insurgent or terrorist activity. This risk is especially high where cash is the primary payment method, as was the case in Iraq. A large contract workload, poor oversight, and high cash flow contribute to increases in fraud, corruption, collusion, and organized crime, which must all be mitigated during planning.

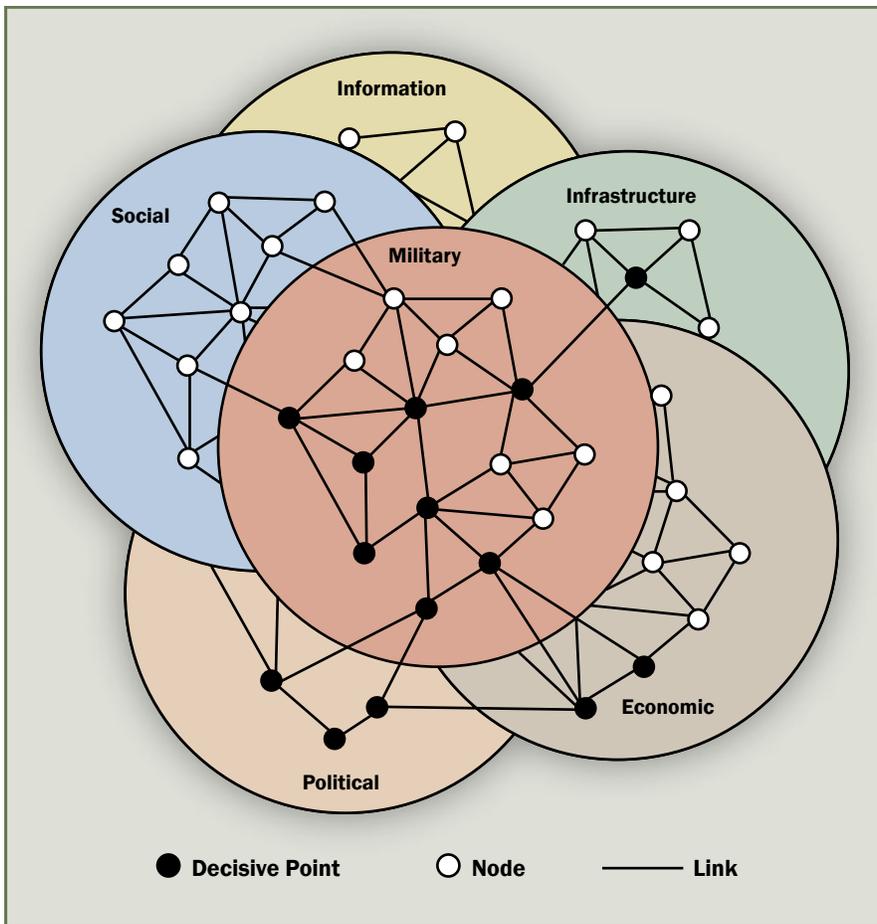


Figure 3: Political, military, economic, social, information, and infrastructure system analysis. (Joint Publication 5-0, Joint Operation Planning)

Even currency selection for contract payments carries risk since using U.S. dollars exclusively may irreparably devalue a local currency. Risk will vary with every operation, but it must be balanced with potential outcomes or payoffs. Ultimately, the CST must consider contract-related risks and integrate mitigation strategies into plans, policies, and procedures.

### **Employment on the Battlefield**

The collective effort of the commander's planning staff and an actively engaged CST performing its key tasks has the potential to positively influence the tactical and operational environments. The team remains involved throughout all phases of an operation to enable various lines of effort, creating positive effects to achieve desired outcomes.

On the battlefield, minor changes to the economic system can and will influence the political, social, military, infrastructure, and other systems. The CST must understand the secondary and tertiary effects of each decision along the economic lines of effort in order to develop plans, policies, and procedures that enable contracting to help shape the environment, rather than fall victim to it.

Decisions made at all levels will influence the operational environment. All CCOs, not just the CST, must understand that contracting's influence goes beyond fulfilling a short-term requirement, particularly when a contract does not support or is actually counter to the operational end state. A simple decision to hire a small group of third-country nationals for a janitorial contract fulfills a unit's requirement, but it does so by possibly displacing employable local nationals.

While that single contract may have been negligible, the social and political systems can be affected, particularly at the local level. Accordingly, the CST must consider the tactical and operational environment and take a "whole of government" approach, whether planning

operations on the Joint Task Force staff or considering contracting policies or procedures at the CCT level.

### **OCS Tasks by Phase**

The assorted OCS tasks, effects, and focus will vary with the different phases of an operation, which are described in Joint Publication (JP) 3-0, Joint Operations. During Phase 0 (shape), the military focuses on theater campaign and contingency planning. OCS planners strive to identify contracting shortfalls as plans are developed, assess marketplace capabilities throughout the region, and ensure contracting force structure is included in the early and overall deployment plan.

Additionally, Phase 0 is the military's opportunity to improve multinational relationships, interoperability, and cooperation among foreign partners and allies. This is accomplished, in part, through recurring multinational exercises, such as Cobra Gold, and command post exercises, such as Yama Sakura. Contracting personnel are heavily involved in these events, spanning the tactical-to-operational range, providing critical planning input, and executing contract support on the ground.

As the operation moves into Phases I through III (deter, seize initiative, and dominate), the CST strives to enable combat operations. The team continues to engage the planning staff as various plans are updated, implemented, and executed. While monitoring current operations, the team focuses on planning future operations.

Accordingly, the CST examines each branch and sequel to determine how and where to leverage contracting to support and enable mission accomplishment. While the CST fulfills its mission at the operational level, most CCT personnel at the division-level and below perform "muddy boots" contracting, fulfilling urgent requirements to support reception, staging, onward

movement, integration, other sustainment functions, and maneuver.

With the transition to Phases IV and V (stabilize and enable civil authority) and the curtailment of sustained combat operations, the CST focuses on long-term tasks and effects along the economic lines of effort. The team continues to provide key inputs to the planning process, identifies contracting requirements early on, and liaises between the supported commander and contracting stakeholders.

In conjunction with the CSB commander, the team also assists in formulating long-term policies and procedures to improve the operational environment. Meanwhile, tactical-level contracting personnel implement CSB and ASCC policies and procedures locally while continuing to fulfill sustainment, reconstruction, and redeployment requirements.

### **Creating Favorable Effects**

Along with phase-specific tasks, the CST continues to be involved across the spectrum of conflict and range of military operations to create favorable operational effects. As JP 3-0 explains, the range varies with the size, purpose, and intensity of the operation.

At one end of the spectrum are shaping operations and activities, such as military-to-military engagements, civil assistance projects, and theater security cooperation programs. Toward the center of the spectrum lie crisis response and small-scale, limited-duration contingencies. At the far end of the spectrum are major combat operations and campaigns generally associated with declared war.

Within the range of military operations are two types of missions for which contracting is well-suited to create favorable operational effects, particularly with early and active CST engagement: stability/counterinsurgency (COIN) and humanitarian assistance/disaster relief (HA/DR).

## Stability/COIN Missions

Iraq and Afghanistan are familiar examples of the stability/COIN environment. The increased force presence during the surge was instrumental in stabilizing Iraq; however, contracting also played a role in the overall success by engaging Multi-National Force–Iraq leaders and mirroring the CST's duties within the ASCC. Analyzing the situation in Iraq helped identify root causes of the insurgency, such as large-scale unemployment.

Senior leaders within the operational and contracting commands then developed strategies to treat the disease, rather than symptoms, of the insurgency. The result was the Money as a Weapons System manual and the Iraqi First policy. These innovative concepts used contracting to target an economic problem with clear social and political repercussions.

JCC–I/A implemented policies and procedures to achieve favorable OCS effects, such as increasing Iraqi employment and injecting capital-building funds into the economy, so as to enable the maneuver commander's stability/COIN strategy and end state. JCC–I/A restricted competition and gave preference to Iraqi businesses, thereby increasing contracting opportunities for those entities while decreasing intrusion by Kuwaiti, Turkish, or U.S. businesses operating within or adjacent to Iraq.

To build Iraqi businesses, JCC–I/A and the civil-military operations centers hosted business development seminars, required vendor registration, mentored business owners, and engaged local leaders to encourage participation in the contracting process.

Using Iraqi businesses to fulfill U.S. and host-nation requirements increased Iraqi employment directly and indirectly, improved the nation's gross domestic product and currency, reduced U.S. and third-country national presence, and stabilized wages. In the end, properly developed and employed OCS effects helped to marginalize the insurgents' influ-

ence, improve Iraq's domestic security, and enable the transition to a legitimate Iraqi government.

## HA/DR Missions

The CST's approach to an international HA/DR environment may be considerably different. Stability/COIN OCS assets strive to bolster the economy through contracts with local businesses, but comparable HA/DR assets may prefer to avoid local purchases.

CCOs tend to deploy as far forward as possible to work directly with the supported unit. This can be counterproductive in a decimated or austere marketplace incapable of supporting U.S. demand or where U.S. forces are vying for the same critical commodities and services as the impoverished civilian populace, the host-nation government, or relief agencies.

For example, during the 2010 Haiti earthquake response, forward-deployed CCOs quickly learned that few supplies or services were available in Port-au-Prince and that the limited quantities that did exist were in high demand. Because of the operational environment, contracting had to change its approach and procure most supplies in the Dominican Republic or the United States. This helped to maintain good relations with Haiti while fulfilling the mandate of providing HA/DR assistance to the region.

In an HA/DR scenario, the number of key stakeholders—both governmental and nongovernmental—increases significantly and each stakeholder will have a different objective and willingness to cooperate with military leaders. The CST and deployed CCOs must remember their mission is to support U.S. forces, not to contract on behalf of the affected civilian population.

Support to the local populace is best provided by the large assortment of nongovernmental organizations, other government agencies, and international government organizations, such as the International Federation of the Red Cross, the U.S. Agency for International Development, and the Unit-

ed Nations World Food Program.

The CST works hand in hand with the military operational staff to develop mission-enabling effects, identify critical logistics or infrastructure capability gaps, and select appropriate contracted and noncontracted solutions that consider the many military and nonmilitary stakeholders.

The Army contracting community has positively evolved using lessons learned in Iraq, Afghanistan, Haiti, and elsewhere, including a number of joint and multinational exercises. Nonetheless, the recurring theme from numerous after-action reviews, comments from field commanders, and the Initial Capabilities Document for Operational Contract Support is this: OCS planning must be an integrated component of the operational-level planning staff.

Though ultimately successful, the Iraqi First program and the Haiti response are examples of where embedded OCS planners could have leveraged contracting much earlier to achieve positive outcomes sooner. To an extent, they reveal the historically reactive nature of contracting.

Embedding a small, but experienced, OCS planning capability within each ASCC headquarters would significantly improve the Army's ability to leverage contracting during operations, reduce the U.S. military footprint in a foreign nation, and develop contracting plans, policies, and procedures to achieve the maneuver commander's desired end state. The CST will be a superb return on investment for each dollar spent supporting the joint force.

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# Modification of the Planning Process for Sustainers Part 2:

## The Military Decisionmaking Process

This is the second installment in a series of three articles that review the planning process, from Army design methodology through assessment. This segment discusses the modifications and distinct variations sustainment planners apply to the planning process.

■ By Dr. John M. Menter and Benjamin A. Terrell

Sustainment planners and staffs conduct the military decision-making process (MDMP) in the same manner as every other proponent in the Army. What is unique about a sustainer's MDMP is the focus. The method does not change, but the format does.

Each functional area of the sustainment unit should keep a separate running estimate. This means supported battalions should have, at a minimum, running estimates for logistics (S-4), personnel (S-1), and religious support (chaplain). In a sustainment command, each branch of the support operations division maintains a running estimate.

### What Is a Running Estimate?

A running estimate provides a single document to which the personnel of a specific branch or section may refer to answer questions about the current operational environment and the ability to support plans relative to that branch or section. The running estimate delineates:

- The tasks the section or branch is tracking.
- The resources applied to each task.

- The measures of effectiveness and performance indicators with current statuses.
- The risks and mitigation strategies.

You may find that this sounds deceptively similar to the components of the operational approach of Army design methodology and several of the steps comprising MDMP's mission analysis; that is correct. A properly formatted, up-to-date running estimate provides almost all of the information a planner needs to properly analyze a mission and establish the foundations for courses of action. [Army design methodology is discussed in part 1 of the series, *Design*, which was published in the March–April 2013 issue of *Army Sustainment*.]

### Developing the Running Estimate

The foundation of an effective running estimate is identifying the information requirements of the branch or section. The estimate developer must ask, "What do I have to know to be able to make informed decisions?" and "What does right look like?" The answers will vary for each particular functional

area and mission set, and specific answers will change with the measures of effectiveness.

Understanding the information requirements, the sustainer next identifies how he will discover the information, the format in which he requires the information, how long the information will be of value, assumptions he will make in the absence of verified data, and the action required when the data is available. Figure 1 illustrates a way to organize this information.

Most of the information sustainers require is available in daily reports, such as the personnel status report and logistics status report, from subordinate, customer, or supplying units. Other information is available through requests for information or the common operational picture. In the case of convoys, it is best to actively participate in the development of the maneuver commander's reconnaissance and surveillance plan and request reconnaissance support from unmanned aircraft systems, engineers, and military police.

Regular reports, by definition, have a submission deadline, and

Task	Information Requirement	LTIOV (Latest time information of value)	Format	Fact [Assumption] Constraint	Source (Date/time group)	Action (Decision Point) [Variance]

Figure 1. Running estimate development matrix.

reconnaissance reports also should have a deadline. The sustainer derives the deadline from the action that the information is driving.

If a convoy is leaving a compound at 0800, reconnaissance information must be available by 0700 in order for the convoy commander to incorporate it into his plan. If the only action driving information requests is meeting the deadline to consolidate information for a report to the next higher headquarters, it is worthless information. If there is no reason to collect data, please reduce the burden on subordinates and stop asking for it.

Armed with data, the sustainer next identifies how to display it so that others may interpret it quickly. Usually, a graphical depiction is best, though some leaders prefer numbers and others bullets. Practically, this translates into how to lay out a command-post battle board, a battle update brief slide, or a common operational picture rich stickie in the Command Post of the Future (CPOF). [Rich stickie is the term used in CPOF for applying a graphic onto a digital map.] The data depicted nests directly into the information requirements. (See figure 2.)

### Analysis and Assessment

Ineffective analysis has been found to be a problem that prevails throughout the Army. Soldiers have data available but lack the skills, desire, or time to analyze the data and determine its impact on operations, the area of operations, and the area of interest.

As opposed to effects-based operations, which attempt to design plans to cause effects on the second and third order, effective analysis is reviewing the information to determine how current trends are going to affect the unit directly or indirectly through the next three planning horizons if the unit does not act to change the trend.

Analysis leads directly to assessment. Sustainers must continually ask, “Am I doing the right things?” (effectiveness) and “Am I doing the right things correctly?” (efficiency). Assessment provides the sustainer with a tool to determine if the plan is moving within acceptable limits, if it is time to proceed to the next phase (a sequel) or initiate a divergent path (a branch), or if the current situation demonstrates a variance that requires a plan revision. Assessment uses the same indicators developed from the measures of effectiveness and performance that produced the information requirements.

Using the exact same standards, the sustainer also evaluates courses of action to determine which one is the best choice. The assessment capability of the running estimate not only enhances mission analysis but also provides the method of evaluation for course of action analysis.

### Intelligence Preparation

Sustainers play a key role in the intelligence preparation of the battlefield. The sustainer has specific information requirements that differ from those of the maneuver planner but are equally as impor-

tant to the success of the mission. Most S-2s do not have the training or experience needed to properly estimate enemy logistics activities. This leaves the sustainment planner with two choices: train an intelligence analyst to think like a sustainer or train a sustainer to integrate the intelligence preparation of the battlefield into logistics plans.

The sustainer’s primary adversary is time. Weather, terrain, route status, and enemy activity affect the wear and tear on equipment and the time required to conduct distribution. The politics, economy, and infrastructure of the operational environment have a major impact on the sustainer’s ability to acquire contracts, make local purchases, and receive strategic and operational distribution. This affects sustainment effectiveness and efficiency.

A sustainer should know how the operational environment affects his mission and how to research the capabilities and shortfalls of what is available. The intelligence cell secures some of this information in its day-to-day operations. Having a sustainer integrated into the intelligence cell reduces redundancy in requests for information.

In many cases, the sustainer has information available or requires information that the intelligence cell does not possess. Having a sustainer integrated into the intelligence cell ensures data sharing. Intelligence preparation of the battlefield without sustainment input provides the commander and staff

with an incomplete picture of the current operational environment.

A sustainment-savvy individual in the intelligence cell can play a crucial role in developing the enemy situation template; assessing enemy capabilities, strengths, and weaknesses; and developing the enemy courses of action. As sustainers know, logistics convoys, caches, and depots are high-payoff targets. That is true for both sides of the conflict, and the best person to determine where the enemy commander will locate his sustainment assets is a sustainer.

The sustainer should analyze the enemy course of action to determine logistics reach, distribution requirements, and the cost of supplies and then provide the developers of the enemy course of action with input on the impact of these situations. This requires work that is out of the norm, but it is the right way to do things. A portion of the generic running estimate and each annex of the operations order requires enemy and operational information. The unit benefits when sustainment planners discover, articulate, and disseminate this data.

### Liaisons

Liaisons are a huge cost in resources but pay great dividends when properly trained and deployed. Liaisons with higher headquarters, customers, and suppliers provide the sustainer unparalleled communication, collaborative and parallel planning, and the opportunity to influence the host command to effectively employ the capabilities of the sustainment unit. Liaisons are responsible for placing themselves in a position to understand their host unit's current operations and plans. They integrate themselves into their host unit's planning cycle and participate in its MDMP.

With or without a liaison, the sustainment unit is responsible for integrating into the customer's and supplier's planning process. The

sustainment unit is responsible for resolving issues, managing information between suppliers and customers, and synchronizing timing. For example, customers and suppliers may find themselves in conflict concerning schedules, materiel handling, changing requirements, and delivery locations.

In a throughput world, it is the sustainer who is responsible for identifying possible conflicts and either resolving them or mitigating their effects. Identifying potential issues requires knowledge of the plans of the customer and supplier and the time to react to the conflict.

Often, acting as a conduit for information, especially concerning in-transit visibility, prevents issues. The sustainer is responsible for ensuring that suppliers and customers have the information they need when they need it so that the right product is in the right place at the

right time.

Understanding the schedules of both the customers and suppliers prevents issues. When a combat sustainment support battalion knows that a maneuver brigade is going to conduct a major operation in five days, it can coordinate the stockpiling of supplies. But when the battalion learns about the operation less than a day before its start, it has no opportunity to prepare.

### Critical Information Requirement

A sustainment commander's critical information requirement (CCIR) is vital to planning, execution, and assessment. Development of the CCIR begins with identifying tasks. The sustainment planner deduces what decisions are required to accomplish the identified tasks. Decisions sustainment planners must always consider are when to resupply and when the critical resupply point will be.

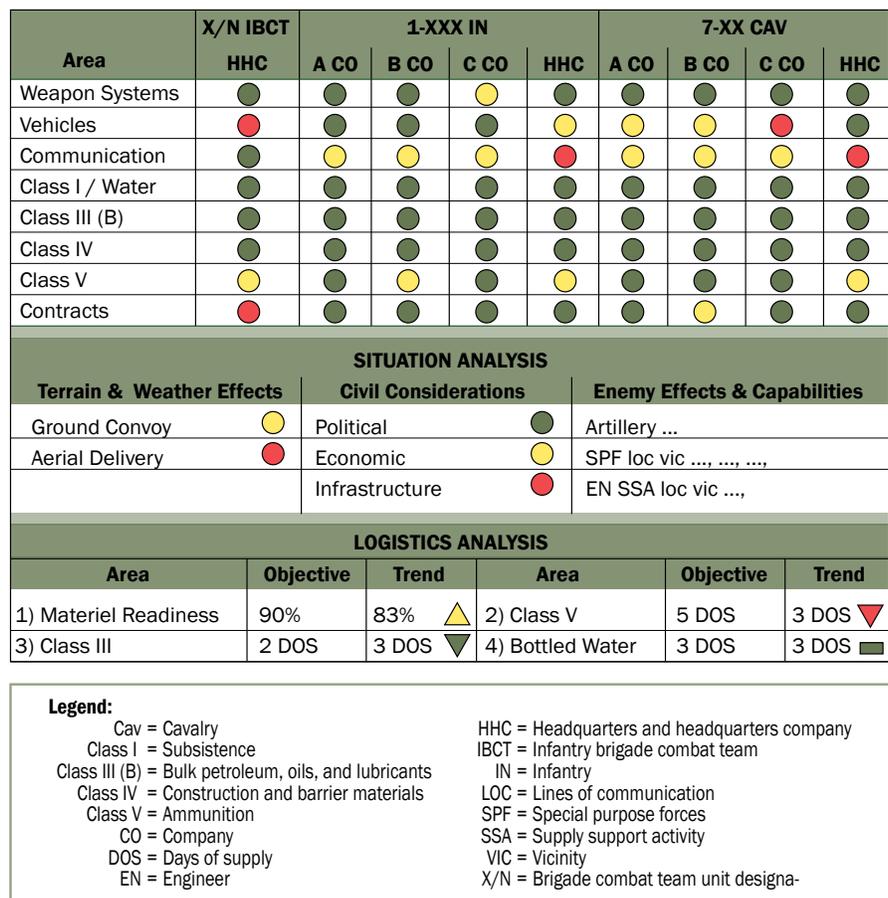


Figure 2. An example of a graphic running estimate for a brigade combat team S-4.

Priority	PIR#	DP#	Intelligence Requirement	NAI	Location (Grid)	Indicator	R&S Tasks	NAI Start DTG	NAI Stop DTG

Capable Assets			Reporting	Coordination	Action Required	Remarks
Own	Higher	Adjacent				

<b>Legend:</b>	DTG = Date/time group	PIR = Priority intelligence requirement
DP = Decision point	NAI = Named area of interest	R&S = Reconnaissance and surveillance

Figure 3. Decision support matrix headers.

Methods of sustainment, locations of sustainment points, and composition of sustainment elements are other decision considerations. Sustainers develop decision points relative to the status (such as class of supply, maintenance, or transportation), numbers (such as quantity or cost), weather, and enemy and civil considerations.

### Synchronization Matrix

With decisions identified, the sustainment planner prepares the information requirement (question) and defines indicators. This information focuses the intelligence cell's efforts and facilitates the development of a decision support matrix (DSM), which will aid in developing the reconnaissance and surveillance plan. (See figure 3.)

Carefully considering required decisions and developing a DSM reduces anxiety during execution. Linking a completed DSM to the synchronization matrix assists in assessment by providing indicators of variances.

Sustainment planners have historically done well preparing a logistics synchronization matrix, which is helpful for ensuring the coverage of all areas, tracking progress, and timing. I recommend that the sustainment planner consider using the synchronization matrix for devel-

oping courses of action rather than waiting until course of action analysis (wargaming) to begin to fill out the details.

Early use facilitates a more thorough development and a more rapid wargame. As in the wargame, the detailed tasks and purposes charted against time phases supports battle tracking of current operations.

The synchronization matrix is a great tool, but sustainment planners should not make it the end product. The objective of the synchronization matrix is to coordinate and synchronize the operation.

The sustainment planner should consider whether to integrate the concept of support into the maneuver plan development and analysis or to participate in the maneuver planning cycle and then develop a detailed plan with multiple courses of action and separate analysis later. Both have advantages.

The determining factor typically comes down to time available. Using its supporting unit's support operations section (or forward support company planners), the maneuver unit J/G/S-4 can effectively conduct concurrent planning to develop the most effective sustainment courses of action to support maneuver operations.

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# The Challenges of Supporting a Theater Sustainment Command

The 1st Theater Sustainment Command's special troops battalion provides logistics and administrative support through split-based operations in the U.S. Central Command area of responsibility.

■ By Maj. Jerry D. Moize

The 1st Theater Sustainment Command (TSC) special troops battalion (STB) is a dynamic organization that executes its challenging mission through adeptness and flexibility. As with every STB, its mission is to provide administrative and logistics support to its parent staff.

Because of the 1st TSC's geographic separation from the area of responsibility (AOR) that it supports, its STB engages in split-based operations, which bring unique challenges requiring multifaceted solutions. As the focus of overseas contingency operations has shifted in the past few years, the STB has likewise shifted its operations and posture, with readiness being the only constant.

## The 1st TSC's STB Challenges

Meeting all of the organizational requirements in any higher-level headquarters can be challenging, but the STB and the TSC must meet these while operating out of multiple geographic locations simultaneously.

The 1st TSC, headquartered at Fort Bragg, N.C., is tasked with providing all sustainment for the U.S. Central Command AOR and maintains a command and staff presence in logistics operations in Kuwait and in combat operations in Afghanistan.

The 1st TSC's STB mission is to deploy and provide logistics and administrative support for the



*A special troops battalion supply sergeant inventories chemical protective equipment that had been turned in by a redeploying unit at Camp Victory, Iraq. (Photo by Staff Sgt. Daniel Yarnall)*

1st TSC staff. In many ways, this means doing what all battalions do: process awards and evaluations, oversee the command supply discipline program, provide maintenance support, and coordinate training, schools, force protection, and force projection.

However, since the 1st TSC, a subordinate command of U.S. Army Central, permanently supports the U.S. Central Command

AOR, it must provide this support to multiple locations and fulfill the ongoing requirement of rotating Soldiers into and out of theater.

An STB completes all of the requirements of a deploying unit—orders, medical screenings, theater-specific equipping, and legal and administrative actions—on a continual basis. Most of these functions are performed through the normal staff sections, but a few

deployment-specific tasks are conducted by the STB's deployment cell. These tasks include coordinating with the point of destination, scheduling and tracking Soldier movement to the aerial ports of embarkation and debarkation, coordinating strategic movement, setting up consolidated medical and administrative reviews, and prescreening and tracking pending redeployments.

The deployment cell provides the battalion staff with flexibility and continuity. The primary staff sections are given the freedom to focus on day-to-day operations and organizational tasks, while the deployment cell executes the continual no-fail mission of getting deploying Soldiers out the door and tracking them.

These missions across the globe present three major challenges to the TSC and specifically to the STB: a wide variety of manning positions, time and space separation, and mission command. To overcome and accomplish its mission, the STB leverages technology, the "pass-back" model, and responsibility sharing and partnership with the TSC staff.

### Using Technology

Combat operations have necessitated the STB's presence in multiple geographic locations. This is a temporary state, which in theory precludes any special manning to accommodate the requirements. The challenge, however, is to synchronize and control the same number of people over multiple locations to complete the mission.

The biggest leveraging tool is technology. Portals, whether they are run by the section, unit, or Army, allow multiple parties to access, share, and transmit information as if they were in the same building.

Video teleconferences, which the STB uses both in formal meetings and at the staff level, allow for staff collaboration to meet the com-

mander's intent and ensure adequate support of the organization's needs. The ability of all parties to communicate and stay connected with their counterparts significantly helps to bridge the gap of physical separation. As an added benefit, when the staff at all locations is properly synchronized, it gains an extra seven to eight hours to get a head start on issues or to close them out.

### The Pass-Back Approach

The pass-back approach enables all parties to use their strengths and maintain the highest efficiency. The intent is that as many actions and requirements as possible are passed from the forward locations of Kuwait and Afghanistan to the main headquarters at Fort Bragg.

This method has two main benefits: The staff at forward locations can handle a higher volume and be more responsive, and the STB has the ability to "triage" requirements and send those that are not as time-sensitive back to Fort Bragg. This in turn lessens the requirement for as many personnel forward.

By requiring fewer staff members forward, the pass-back method also allows for a greater concentration of expertise at the main headquarters, enabling better mentorship, cross-training, and grooming of Soldiers. It better prepares Soldiers to perform their missions when they deploy forward and gives them a greater capability to work the more difficult tasks as they are passed back.

### Partnerships

Lastly, the STB staff partners with its higher headquarters and subordinate units. At times, their responsibilities overlap to facilitate split-based operations and achieve the mission of taking care of Soldiers.

Because of the thin spread of personnel, the forward-deployed battalion staff may be called on

to conduct company-level tasks in Kuwait or Afghanistan. Likewise, similar skill sets in the TSC staff may be used to assist in battalion-level actions when needed.

This combination of echelons is neither intentional nor habitual, but as a partnership at all levels, it has proved extremely helpful in pulling the organization through operational shifts when personnel or specific skill sets were most limited.

The focus of the STB is in a state of change. At its inception back in 2007, the war in Iraq was the focus. The TSC's personnel were deployed heavily into Kuwait in support of Operation Iraqi Freedom. As Operation New Dawn ended, the TSC shifted direction, energy, and personnel immediately to Afghanistan, where it has the monumental task of not only sustaining the fight but also retrograding \$48 billion worth of equipment from the battlefield. The retrograde has become the 1st TSC's priority. However, as that conflict comes to a close, the TSC and its STB must be ready to pivot, deploy, and support elsewhere.

Few things are certain in today's operational environment. As long as there are Soldiers on the ground, there will be logistics and administrative requirements. As long as the TSC operates across the globe, in one way or another, the STB will continue to do so as well.

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# Tip of the Spear: The U.S. Coast Guard's RAID in Afghanistan

In the U.S. Central Command area of responsibility, Coast Guardsmen fill the important role of inspecting freight containers for safety, seaworthiness, and proper documentation.

■ By Lt. Cmdr. Kent G. Sieg, U.S. Coast Guard Reserve

The fact that the U.S. Coast Guard has a significant presence in Afghanistan is not well known, and yet it is quite true. Some of its members serve on what is certainly one of the Coast Guard's most inland assignments ever: the redeployment assistance and inspection detachment (RAID) that is spread throughout the landlocked nation.

RAID's activities have gained visibility, and its members have become an increasingly recognizable part of the war effort. The detachment has deployed to several countries in the U.S. Central Command area of operations, and the Coast Guard has maintained a continuous presence in theater since the first RAID forces arrived in September 2003.

## Organization

RAID falls administratively under the Coast Guard Patrol Forces Southwest Asia, headquartered in Bahrain. Its command element resides at Camp Arifjan, Kuwait, co-located with the headquarters of the Army's 595th Transportation Brigade, Military Surface Deployment and Distribution Command (SDDC). RAID supports SDDC and is operationally controlled under its purview.

In Afghanistan, the detachment's 12 members fall under the tactical command of detachments of the 831st Transportation Battalion. These Coast Guardsmen have been stationed at Bagram Airfield, Kan-



*Coast Guard Petty Officer 2nd Class Albertico Vargas, Coast Guard Redeployment Assistance and Inspection Detachment Team 13, checks the top of a container for seaworthiness and structural integrity in Helmand province, Afghanistan. (Photo by Petty Officer 3rd Class Monique LaRouche)*

dahar Airfield, and Camp Leatherneck but have journeyed to forward bases all over the country.

Until December 2011, RAID was deployed in support of Operations Iraqi Freedom and New Dawn, inspecting nearly 20 percent of all of

the Army's containers, which held 2.2 million pieces of equipment being moved out of Iraq. The end of split combat support operations since early 2012 has greatly eased the accountability mission for this small but widely dispersed unit.

## Container Inspections

Forces in Afghanistan use standard containers to move equipment and supplies. Freight containers hold several kinds of products, from food to ammunition, and the Army efficiently supplies its forces by using such containerized cargo. The Coast Guard has long specialized in effective container inspections, which is the reason the Coast Guard received this mission.

RAID has worked closely with Australian, British, and Afghan troops while also servicing its primary customer, the U.S. Army. In late 2011, RAID's portfolio expanded to include supporting Marine Corps elements at Camp Leatherneck, where a third of the containers had failed inspections prior to the Coast Guardsmen's arrival.

RAID inspects containers regardless of whether they are transported through Pakistan or through

longer routes in central Asia. On average, RAID inspects nearly 300 containers per month. Because fees for cargo held up in Arabian or Central and South Asian ports can cost \$5,000 per day, RAID saves the Department of Defense (DOD) a considerable sum in transportation expenses and fees.

Through recertification and corrective fixes, RAID has also reduced the number of containers leased by the DOD. The reduction in leased containers resulted in fee savings of \$500,000 in the last quarter of calendar year 2011, solely for the Iraq drawdown.

The cost savings in Iraq are being replicated in Afghanistan. With a similar cycle of redeployment underway, the small RAID element stationed in Afghanistan has remained busy. RAID members inspected more than 7,000 containers on the ground in Afghanistan during 2012.

## The Inspection Process

The RAID teams conduct several basic types of inspections. Most of their work revolves around checking for structural seaworthiness. According to international rules, containers must have attached safety plates indicating that they are fit for an ocean voyage. Those that are not structurally safe to take aboard commercial ships are considered "frustrated." Not only can this cargo be blocked from moving through port, but the organizations owning these containers will incur extended leasing fees.

Other inspections include those for proper loading and labeling of hazardous materials, examination and sealing of containers for customs border clearing, reviewing shipping credentials, and on occasion, special procedures for rolling stock. RAID personnel are fully qualified to administer all of these inspections.

Coast Guardsmen go beyond the minimum standards for inspections. They ensure proper packing and documentation, and they also make minor repairs so that containers meet movement standards. RAID members also train Army unit movement officers and hazardous materials certifiers.

RAID's work has been funded out of the approximately \$250 million transferred by the DOD to the Coast Guard from the special Overseas Contingency Operations budget. The RAID team has become a sought after element by ground units primarily because it facilitates a safer and more expeditious return home for troops and their equipment.

## Being a RAID Member

Coast Guardsmen from RAID have been to all corners of the current theater of operations. It often proves easier for RAID members to travel to sites than to have the containers brought to a centralized location for inspection. Because their services are needed at so many bases, RAID members are in constant motion.

RAID personnel frequently jour-



*Coast Guard Reserve Petty Officer 1st Class Nelson F. Del Valle, Coast Guard Redeployment Assistance and Inspection Detachment Team 13, tags a container after inspection in Helmand province, Afghanistan. (Photo by Petty Officer 3rd Class Monique LaRouche)*

ney to outlying forward and contingency operating bases around Afghanistan. Air travel is preferable for reasons of personal security, but occasionally RAID members join land convoys moving between posts. As a result, RAID members collectively log an average of 35,000 miles in travel per year. This trekking has not been without dangers; they have been exposed to direct and indirect fire in various locations.

Withstanding the comparatively spartan and arduous conditions of Army and Marine Corps field life is by all measures a novel experience for RAID members. They live in freight containers, tents, or B-huts and periodically have to run for the bunkers during mortar attacks.

With these conditions in mind, program staff carefully select RAID personnel for this demanding work. They have historically been drawn from the ranks of senior and experienced Coast Guard Reservists and are often law enforcement or emergency response veterans in the civilian sector. More recently, high-performing active-duty Coast Guardsmen have been added to the ranks, giving the team a more effective mix.

All RAID team members are volunteers. Enhanced pay, priority selection for future assignments, and a rest and relaxation trip to anywhere in the world are among the incentives offered, and to varying degrees these factors do matter to those who join the team. But these Coast Guardsmen are also motivated by the desire to do their part by directly supporting troops in the combat zone. It is in this manner that their specialized Coast Guard marine safety expertise has played an important part in the war effort.

To prepare for deployment, the RAID teams undergo extensive training. Members first attend preparatory weapons and force protection training at a contracted facility in Moyock, N.C. Then they report to Fort Dix, N.J., for a month of intensive combat training and theater orientation conducted by experienced



*Coast Guardsmen inspect a redeploying container in Helmand province, Afghanistan, before sending the container back to the United States. (Photo by Petty Officer 3rd Class Monique LaRouche)*

Soldiers. There they are also exposed to the Army's very different way of doing things. In the meantime, all personnel acquire Coast Guard inspector qualifications if they do not yet already possess them.

The shipmates arrive in theater first in Kuwait, where personnel conduct inspections at Camps Arifjan, Buehring, and Patriot under the aegis of the 595th Transportation Brigade. After this initial assignment, they rotate forward into what is still a hazardous combat zone.

In Afghanistan, RAID Coast Guardsmen are part of a small element doing a big job, and they do it well. Over the last decade, multiple RAID members have been selected as the Coast Guard's enlisted person of the year following the conclusion of their tours. RAID members also have received Army, Navy, and Marine Corps medals, including the Bronze Star. Furthermore, during

their off-duty hours, RAID personnel have volunteered to assist in tending to wounded personnel in base hospital emergency rooms, spent time teaching English to local children, and staffed the United Service Organization's entertainment centers.

Through their status as RAID members, Coast Guardsmen operate in forward areas, notably far removed from any major body of water. These U.S. military personnel continue to successfully represent their branch by serving as its "tip of the spear" in a current combat theater of operations.

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# Medical Supply Requisition in the Decisive Action Fight

■ By Capt. Matthew L. Tillman

As our Army enters decisive action operations, many lessons need to be relearned by Soldiers who developed their skills in the recent conflicts. One such lesson is class VIII (medical materiel) requisition and distribution.

Brigade combat teams (BCTs) have managed class VIII as a line item requisition process. Units stocked up on supplies at operating bases and then requisitioned replacements. At the BCT level, the formal stock is held at the brigade medical supply office (BMSO), but in most locations, even medical platoons carry excess stock.

Using the Defense Medical Logistics Standard Support Customer Assistance Module (DCAM), units managed these stocks with automated reorder points and inventory management tools. The BMSO also used DCAM to manage the BCT's line item requisitions. DCAM, however, required space and reliable Internet connectivity.

As the Army again fights on the move and combat trains, field trains, and brigade support areas replace logistics nodes on forward operating bases, BCTs will need to relook at how they requisition class VIII. Forward support companies will eventually establish their very small aperture terminals to requisition repair parts, but medical logisticians cannot wait until their supported units require resupply to begin requisition.

The BMSO can partially solve this problem by articulating a well-rehearsed communications plan that includes primary, alternate, contingency, and emergency means for units to requisition class VIII. Units should continue to push for DCAM use in

decisive action operations because of its inventory management tools. Blue Force Tracker will be needed to fill the gaps because of the distances that will be covered. As a contingency, emergency requisitions should be submitted by radio or, as a last resort, by paper requisition on supply backhaul.

Because the Army has become comfortable with excess stocks, which are hard if not impossible to move in decisive action operations, the BCT must scrutinize the BMSO authorized stockage list (ASL).

Field Manual 4-02.1, Army Medical Logistics, authorizes the BMSO to stock 100 to 300 lines to be "managed as a safety level and released to support the brigade when routine replenishment operations do not meet mission requirements."

Although the ASL is still used in current theaters, the BMSO will need to carefully tailor the number of lines carried to meet increased demand during early-entry operations and ensure that the amount does not become unmovable. (The current modified table of organization and equipment authorizes the BMSO only two cargo medium tactical vehicles and no specialized containers.)

An ASL review board is the key to successfully determining the right number and type of critical items. This review board is similar to those conducted by maintainers to determine which repair parts to stock in the BCT. The BMSO should start this process using historical demand data and then allow the clinicians of the BCT to review, make suggestions, and then formalize the ASL by having the BCT surgeon and the brigade support battalion com-

mander officially authorize the list.

Field Manual 4-02.1 states, "The BMSO, upon arrival into the theater, will be resupplied by medical resupply sets or preconfigured push-packages until line item requisitioning is established." Likewise, the BMSO should plan to push preconfigured packages to supported battalions based on time and patient estimates generated as part of mission analysis and staff estimates. During operations, those planned pushes should be validated based on disease and nonbattle injury reporting for "sick call" medical supply and battle injury rates for trauma medical materiel.

The BCT should also coordinate with its supporting medical logistics company to make sure that external push-packages are relevant to supported units and every attempt is made to push supplies before they are required.

BCT class VIII requisition has come a long way, but some of the lessons learned will not apply as we transition into decisive action and early-entry operations where a mature theater medical supply infrastructure does not exist. Planners will need to anticipate requirements and manage stocks based on consumption that validates staff estimates.

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*Soldiers with the 2nd Brigade Combat Team, 4th Infantry Division, inventory medical equipment during their medical reset. (Photo by Staff Sgt. Ruth Pagan)*

## Keeping Medical Materiel Relevant

**Conducting an authorized stockage list review board can be critical to ensuring that the brigade medical supply office has only the medical supplies it needs.**

■ By 1st Lt. Kathryn L. Buckland

An authorized stockage list (ASL) review board conducts a line-by-line review of an ASL to determine which items should be retained and which should be deleted. Using historical data along with their own experience, participants on a class VIII (medical materiel) ASL review board ensure that the brigade medical supply office (BMSO) stocks the items needed to meet unit readiness demands.

### **Benefits of the ASL Review Board**

The BMSO uses the ASL review

board process to determine which class VIII line items to stock in order to meet customer demand. The process increases customer satisfaction and decreases customer wait time. It also provides cost savings to the Army by reducing inventory and providing quality assurance and quality control programs that rotate stocks to prevent expiration.

The review process enables the Army to make better use of warehouse space and build smaller facilities in theater to meet mission requirements. Medical logisticians must understand and use the ASL

review board process to synchronize class VIII stockage levels with customer demands and mission requirements.

In the first 30 days after conducting an ASL review board and redistributing excess supplies, BMSOs in theater generally have more manageable stockage levels, higher customer satisfaction ratings, and less destruction of excess class VIII supplies. BMSOs are then able to spend more time on critical tasks such as training Soldiers instead of trying to keep pace with mounting and unchecked demands.

## Operational Environment

Studies by the RAND Arroyo Center have confirmed that high-performing ASLs have their greatest direct effect on equipment readiness through their impact on supply chain processes and resources. The BMSO must be responsive to all of its customers' medical materiel requirements. If it fails to have the necessary class VIII on hand or within the supply system, the health service support mission fails and units cannot sustain the fighting force.

## Assessing the Situation

Noting the problems with the BMSO's large ASL, high customer wait time, and low customer satisfaction, the brigade surgeon, BMSO officer-in-charge, and support operations (SPO) medical logistician for the 4th Brigade Combat Team, 1st Infantry Division, looked into the situation. After a few hours of collaborative research they found the following facts about the current ASL.

**Unmanageable stockage levels.** After the relief in place/transfer of authority (RIP/TOA), the BMSO reviewed the current ASL consisting of 620 line items, of which the medical logistics company stocked only about 80 percent. The remaining 20 percent of the items were not in the class VIII supply system because the BMSO customers were ordering items that were unauthorized or not on the U.S. Central Command formulary.

To meet customer needs, the BMSO's ASL should be based on the medical logistics company's ASL. In turn, the aid stations should order items only from the BMSO's ASL unless they submit either a letter of justification or an operational needs statement. (Which document is required is dictated by the dollar amount and unit policy.)

**Low customer satisfaction.** With such a large ASL, less than 89 percent of customer orders were filled by items on the BMSO's ASL. Army Medical Department Supply Bulletin 8-75-11, dated Nov. 20, 2012, states that the management

level for customer demand satisfaction is between 90 percent and 98 percent, indicating that, based on request processing time and fluctuating demands, the items stocked at the BMSO were not sufficient.

**Wasted resources.** Items on the warehouse shelves were not consolidated based on expiration date, and class VIII was expiring. This caused unnecessary financial waste and destruction of class VIII items that could have been redistributed to other U.S. and coalition forces or Afghan National Army units through the Foreign Excess Personal Property program.

**Unavailable customer demand history.** The BMSO completed the RIP/TOA without any historical data on customer demand for the previous year. Class VIII had not been tracked manually or using the Logistics Reporting Tool like other classes of supply. The only automated logistics system available at the brigade combat team (BCT) level is the Defense Medical Logistics Support System Customer Assistance Module (DCAM), which cannot interface with the Battle Command Sustainment Support System (BCS3). This lack of interoperability between DCAM and BCS3 prevents real-time class VIII visibility in the supply system.

**Personnel strength.** The BMSO staff is authorized one officer and five enlisted Soldiers. The 4th Brigade Combat Team's BMSO deployed with one officer and four enlisted Soldiers. However, the biomedical equipment specialist was conducting battlefield circulation during the deployment, thereby reducing the staff to only three Soldiers.

These findings indicated that using the ASL was only partially effective in forecasting future demands, setting inventory levels, and meeting customer demand. Based on these findings, the brigade leaders decided to conduct an ASL review board to address the situation.

## ASL Review Board Members

The ASL review board members

are the brigade surgeon, the battalion's medical service providers, the brigade support battalion commander, the BMSO, and the SPO medical logistician. The brigade surgeon and medical service providers provide insight to the clinical effectiveness of the ASL's pharmaceuticals, and the BMSO provides insight to the ASL's nonpharmaceuticals based on demand history and request processing time.

The brigade support battalion commander chairs the ASL review board, and the SPO medical logistician acts as the facilitator and mission command element. The SPO medical logistician also consults with the supply support activity accountable officer as needed for lessons learned and advice.

## The Review Process

The ASL review board process does not guarantee the availability of critical class VIII items. What the process does guarantee is that class VIII items identified as additions will be placed on the ASL at a specific reorder point to maintain stockage levels. The actual availability of items at the BMSO depends on the request processing time and the consistency of demand before the next ASL review board.

The retention of a current ASL line item is based on the number of demands, the quantities ordered, the request processing time, and clinical effectiveness. A line is authorized to be added to the ASL if customers demand an item 10 times in a nine-month deployment rotation. Items demanded three or more times are authorized to be retained on the ASL. Recommendations for non-demand supported or nonessential items must be fully justified to the ASL review board for retention.

The request processing time is defined as the number of days from the date a request is received at the BMSO to the date the materiel is delivered to the customer or the customer is notified that the materiel is ready for pickup. For nonstocked items, the request processing time is



*Soldiers inventory medical supplies received as part of the 2nd Brigade Combat Team's medical reset. Having an accurate ASL helps ensure that the items received are what the medical personnel will need. (Photo by Staff Sgt. Ruth Pagan)*

the number of days from the date a customer request is received at the BMSO to the date the request is passed to the supply source or to the supporting contracting activity.

Items stocked at the BMSO warehouse arrive to customers within two to five days. Requests for nonstocked items are forwarded to the medical logistics company at Bagram Airfield. Nonstocked items take two weeks to receive at the BMSO and another two to five days to deliver to customers.

Items that are requisitioned from the U.S. Army Medical Materiel Center Europe–Southwest Asia in Qatar take three to four weeks to arrive at the BMSO warehouse and another two to five days to be delivered to customers. Matching customer demands with items stocked at the BMSO warehouse reduces customer wait time significantly.

Clinical effectiveness is the extent to which specific pharmaceuticals do what they are intended to do, such as maintain and improve the

health of patients. Within the current ASL consisting of 354 pharmaceuticals, the BMSO's excess inventory of both stocked and nonstocked pharmaceuticals is not supported by demands. The brigade surgeon and battalion medical service providers must agree on a formulary that will meet clinical effectiveness criteria and demand levels.

### **Review Process Phases**

Board members execute the ASL review process in four phases using a Microsoft Excel spreadsheet exported from the BMSO's local catalog in DCAM on the Medical Communication for Combat Casualty Care server.

**Phase 1.** The SPO medical logistician briefs the ASL review board concept of operations to the BMSO officer-in-charge and brigade surgeon. The SPO medical logistician provides a timeline synchronizing key tasks with key dates over a span of 14 days.

**Phase 2.** The brigade surgeon and battalion medical service providers

review the pharmaceuticals in the current ASL to streamline quantities based on clinical effectiveness. The BMSO reviews the nonpharmaceuticals based on demand history and request processing time. The brigade surgeon and BMSO officer-in-charge decide on ASL additions and deletions.

**Phase 3.** The BMSO updates its local catalog by adding reorder points to all line items on the updated ASL in order to maintain stockage levels. Reorder points are not set for items deleted from the ASL so that customers can continue ordering deleted line items, clearing them from the warehouse's shelves until the on-hand balance reaches zero. When the on-hand balance reaches zero, the line item will be removed from BMSO's local catalog and will not be viewable to level I customers in their supplier files.

**Phase 4.** The BMSO informs customers of the ASL reduction and distributes the new ASL to customers on a Microsoft Excel spreadsheet.

## Impact on Deployed Operations

In its first 30 days, the ASL review board demonstrated its benefits in five areas: stockage levels, customer satisfaction, redistribution, logistics estimates, and time management.

**Stockage levels.** The BMSO streamlined its ASL by more than 38 percent—from 620 line items (354 pharmaceuticals and 266 nonpharmaceuticals) to 385 line items (196 pharmaceuticals and 189 nonpharmaceuticals). The BMSO emailed its customers a Microsoft Excel spreadsheet listing the items that had been removed from the ASL, offering them as free-issue items.

**Customer satisfaction.** The BMSO increased its customer demand satisfaction from less than 89 percent to 95 percent in its first two weeks, indicating that customers were ordering more items from the ASL with reduced customer wait time.

**Redistribution.** Excess class VIII items removed from the ASL were inventoried, consolidated, and redistributed to other Department of Defense units, International Security Assistance Force adviser teams, or Afghan National Army forces to encourage consumption rather than destruction.

**Logistics estimates.** The BMSO now uses Microsoft Excel pivot tables to manually track customer demand history, which will be used in future ASL review boards. A pivot table is a data summarization tool that automatically sorts, counts, totals, or averages the data stored in a spreadsheet, such as requests per customer, therefore generating demand history. The SPO medical logistician works with the sustainment automation support management office to incorporate class VIII into the Logistics Reporting Tool.

**Time management.** The BMSO now dedicates more time to medical equipment maintenance, individual Soldier skills training, and customer-oriented service such as customer assistance visits rather than trying to keep pace with unchecked demands.



*Spc. Conrad Moore and Pfc. Brittany Escamilla, both health care specialists with the 2nd Brigade Combat Team, inventory the contents of a ground ambulance set during a medical reset. (Photo by Staff Sgt. Ruth Pagan)*

The BMSO ASL is not stagnant; it is a living document that continues to change based on customer demands. Accordingly, with the ongoing drawdown in Afghanistan, the ASL should be reviewed quarterly to meet changing customer demands and supplier catalogs.

As stated by the Army Medical Department lessons learned chief, retired Lt. Col. Jeffery L. McCollum, “BCTs are the base for future fights . . . synchronization and tracking of class VIII is so important—the Soldier’s life may depend on it.”

In the interim, Fort Riley, Kan., has established a template for conducting a class VIII ASL review board that other units and institu-

tions can use both in garrison or forward, which will continue to benefit the 1st Infantry Division for many years to come.

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# The Military Occupational Specialty Administrative Retention Review

■ By Maj. Xarhya Wulf

The Military Occupational Specialty (MOS) Administrative Retention Review (MAR2) is the Army's fix to the confusing and lengthy MOS Medical Retention Board (MMRB) process. The MAR2 program became effective Aug. 23, 2012, through Army Directive 2012-18 and determines whether a Soldier with a permanent physical profile 3 or 4 (P3 or P4) will be retained in his primary MOS (PMOS)/area of concentration (AOC), reclassified into another MOS, or referred to the Disability Evaluation System (DES).

## Background

The DES is used to determine the fitness for duty and applicable disability benefits of Soldiers with duty-related impairments. The DES is composed of the medical evaluation board (MEB) and the physical evaluation board (PEB). Soldiers are referred to the DES when they no longer meet medical retention standards in accordance with chapter 3 of Army Regulation 40-501, Standards of Medical Fitness. Four methods are used for DES referral:

- An MEB initiated by the medical treatment facility (MTF).
- A fitness for duty medical examination.
- The Reserve component non-duty-related process.
- The MMRB (now replaced by the MAR2 program).

The MMRB was costly, lengthy to adjudicate, and not streamlined across components. On Jul. 2, 2008, Gen. George W. Casey, Jr., then Army Chief of Staff, asked retired Gen. Frederick M. Franks, Jr., to lead an effort to review

the medical evaluation board/physical evaluation board process. Franks' 2009 study identified that the MMRB was cumbersome and confusing.

Further analysis was conducted, and the Army initiated a MAR2 pilot program on Aug. 1, 2010. As a result of the successful 2-year pilot, the MAR2 process was approved for Army-wide use. The MAR2 process saves the Army an estimated \$15.3 million and more than 16,000 man-hours annually. MAR2 also significantly shortens the turnaround time for adjudication.

## Starting the MAR2 Process

The MAR2 process applies across components, but the timeline may be longer for Army National Guard and Army Reserve actions.

Figure 1 provides a look at the process. First, the Soldier receives a permanent designator P3 or P4 on a Department of the Army (DA) Form 3349, Physical Profile. On a weekly basis, the installation career counselor or a designated representative receives the profile from the patient administration division and sends it to the first commander in the rank of lieutenant colonel or higher in the Soldier's chain of command. If the commander identifies a discrepancy in the profile, he may refer the Soldier to the profiling authority for profile reassessment.

The commander or his designated representative must then counsel the Soldier on the MAR2 process and document it on a DA Form 4856, Developmental Counseling Form. Once this is done, the commander or his designated representative will ensure the MAR2 packet is prepared and forwarded to the installation career

counselor, who will forward the packet to the component's senior human resources authority.

Army Directive 2012-18 outlines the specifics of the program, and Military Personnel [MILPER] Message 13-036 identifies the specifics on the packet's preparation.

## Adjudication

The senior human resources authority reviews the documents for accuracy and adjudicates one of three options.

**Retain the Soldier in his PMOS/AOC.** The Soldier either meets PMOS/AOC standards or has been provided a waiver by his PMOS/AOC proponent.

**Reclassify the Soldier.** The Soldier does not meet the standards for his PMOS/AOC and a waiver of the standards was not favorably considered by the proponent. However, the Soldier is able to perform the functional activities required of every Soldier listed in block 5 of Department of the Army Form 3349 (physical profile) and remains eligible for reclassification into a different PMOS. (The MOS that the Soldier is reclassified into is based on the needs of the Army.)

**Refer the Soldier to the DES.** The Soldier does not meet PMOS/AOC standards and does not qualify for reclassification into a different PMOS/AOC because of his physical profile or because manpower requirements do not support reclassification.

## The Appeal Process

Once the Soldier receives notice of the commander's decision, he has 10 duty days to submit an appeal. The mere fact that the Soldier does not

agree with the PMOS/AOC approved by the Human Resources Command for reclassification is not a valid reason to appeal. Appeals are initiated for material errors or missing documents from the Soldier's MAR2 packet.

If the Soldier agrees with the decision or elects not to appeal, the decision will become final on the date of agreement or election.

The appeal process is as follows:

- The Soldier submits an appeal in writing to his commander.
- The commander may make a recommendation on the appeal, but it is not required. However, the commander is required to transmit the Soldier's appeal through the chain of command to the appellate authority for a final decision.
- The appellate authority issues a written decision on the Soldier's appeal. This decision is final on the date of issuance.
- The written decision is transmitted to the Soldier's commander, who will notify the Soldier of the decision.

### MAR2 Process Considerations

From the time a Soldier receives a permanent P3 or P4 profile until the

MAR2 process is completed, including a final decision on any appeal, the following conditions apply:

- The Soldier is temporarily nondeployable; however, the commander may permit deployment after consulting a medical officer.
- The Soldier is eligible for awards and promotions.
- The Soldier is ineligible for assignment instruction or orders, reenlistment, permanent change of station, transfer within or between components, or training. If the Soldier received an assignment or orders before initiation of the MAR2 process, the process must be completed and a final decision rendered before proceeding on assignment.
- The Soldier may be subject to disciplinary action.
- The Soldier is required to perform duties within profile limits.

MAR2 uses a software application within the Medical Operational Data System called e-Profile. It is a global tracking tool that is used for Soldiers with temporary or permanent medical conditions that may render them medically not ready to deploy.

Once the final decision has been received and accepted by the Soldier, the component's senior human resources authority will update the administrative system and the Medical Protection System with the appropriate data.

Army Directive 2012-18 contains examples of the MAR2 counseling form, the Soldier's memorandum, the senior human resource authority decision, and the Soldier acknowledgment of the final decision. Soldiers who have questions are encouraged to contact their unit career counselor or health services representative.

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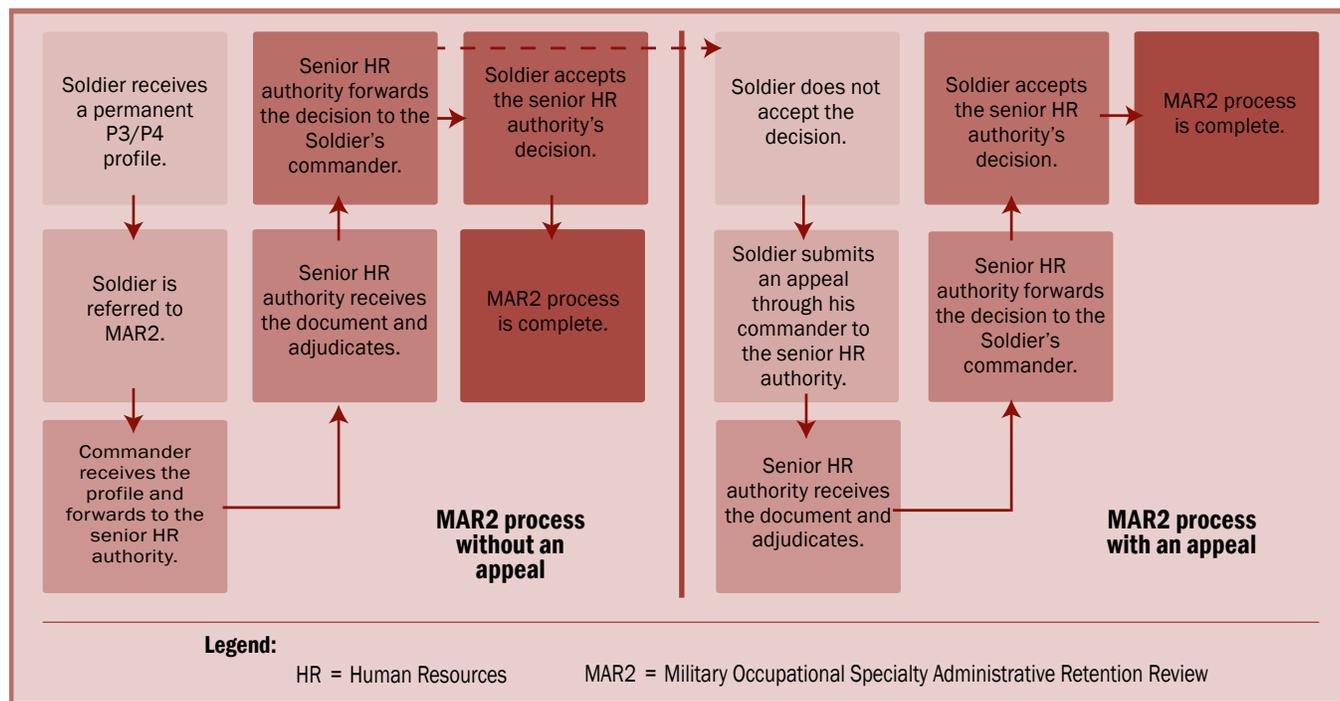


Figure 1. The Military Occupational Specialty Administrative Retention Review Process.

# What BCS3 Can Do for You

■ By Maj. Mark A. Folkerts

**T**he Battle Command Sustainment Support System (BCS3) has been around the Army since 2004 and has many stigmas associated with it. As the Army has evolved, BCS3 has been upgraded.

From the beginning, BCS3 was recognized as a good in-transit visibility tool. Today, BCS3 offers more features and tools for in-transit visibility and a new reporting tool that is easy to use and flexible in the ever changing operational environment.

The 45th Sustainment Brigade executed a BCS3 implementation plan over a two-month period while deployed to Kandahar, Afghanistan, to assist with logistics management. The end state was to provide a single interface for commanders to maintain visibility of their logistics posture in any decisive action.

## The Logistics Reporting Tool

The Logistics Reporting Tool (LRT) in BCS3 allows commanders to see their units' logistics reports from anywhere in the world using a Microsoft Windows-based computer with Java installed. A BCS3 computer is not required. LRT allows company commanders to input their on-hand status for any supply class, including different types of rations, bottled and bulk water, and even blood products. LRT also allows the commander to input personnel numbers, including for contractors and civilian employees.

LRT is easy to use for commodity management; entering data is as easy as using a Microsoft Excel spreadsheet. Once the unit representative sets up the BCS3 system in the operations center, any S-6 specialist can install LRT on any computer in the brigade. It is important to assign user names in the BCS3 system

so that managers can see who makes updates.

All LRTs will connect to the BCS3 Internet Protocol address and provide information that the companies input under the "Log Data Input" tab. Commodity managers and personnel managers can then use the "Log Data Output" or "Rollup" tab to manage their commodities.

Using LRT, staff sections and support operations branches can see logistics data from any unit in the Army in any part of the world. After selecting the task organization and creating a list of supplies that they want to track, commanders and staffs can refine and filter out unnecessary information to give them a picture of what's important. Higher headquarters will mandate basic loads or authorizations, and subordinate commanders will input quantities on hand.

LRT calculates statuses using a set logistics factor file and other values in the spreadsheet. Managers no longer have to receive files from subordinates, copy and paste them into a consolidated report, and email the final report to their higher headquarters. LRT aggregates and calculates the needed information at the push of a refresh button.

Now that LRT feeds information into BCS3, operations centers can build a common operational picture that shows units by location and status. This displays as a map-based picture that can be used to quickly access LRT from BCS3. BCS3 also allows you to turn on a feature that shows each unit's aggregate logistics status color (green, amber, or red).

## BCS3's Time-Saving Features

If you were to investigate the

management of class IIIB (bulk petroleum, oils, and lubricants) in Afghanistan, you would find several personnel working a full day to produce a Microsoft Excel document called the REPOL (bulk petroleum contingency report). With an order from the top to use the LRT, units can input class IIIB at the fuel site in 10 minutes and allow every manager all the way up to Department of the Army headquarters to see their status immediately. This would eliminate the countless personnel hours needed to put together these spreadsheets.

A tool in BCS3 allows managers to quickly reconcile requisition numbers and document numbers without the need to track down each one through other systems. The RON/DON (request order number and document order number) tool that maintenance Soldiers in the 117th Combat Sustainment Support Battalion used saved two to three hours of work a day over the old way of obtaining the numbers. And the tool produced a spreadsheet that they could easily copy to the battalion's O26 report, which lists deadlined equipment.

## Implementing BCS3

Now that you have seen a glimpse of the many benefits to BCS3, you may ask, "How can a unit implement this system into its battle rhythm among all the other requirements?" With command emphasis, you can implement BCS3 in two months based on the 45th Sustainment Brigade's three phased implementation plan. Remember that the more staff work (such as overlays, task organizations, and tracked items lists) that is completed at higher levels, the less that

is required at lower levels.

**Foundation phase.** In this phase, the 45th Sustainment Brigade's S-3 set up the unit task organization (UTO) with help from the field service representative. The UTO allows the LRT operator to report the right logistics status for the right unit. It also allows the LRT and BCS3 to aggregate logistics data so brigade managers can quickly see the brigade's status or drill down to the data of a specific company.

At the same time, the S-4 set up the tracked item list (TIL). This list allows staff sections to identify the items that the commander wants to see in a report. It is essential to create the UTO and TIL in order to manage the right information. Operators at all levels will use the UTO and TIL to set up their systems on their office computers.

Next, the S-6 worked with the field support representatives to install LRTs on the computers of all officers-in-charge, noncommissioned officers-in-charge, and supply and personnel managers. The field service representatives assisted with setting up a BCS3 server for the LRTs and local access portals and then set up a username and password profile for each user.

Lastly, the BCS3 coordinators started a working group to analyze issues and synchronize efforts.

**Reporting phase.** In this phase, the brigade started entering data into LRT. Because the S-4 had set up the TIL in the previous phase, inputting rows in LRT was simpler for the subordinate units. As the units reported more data, the S-4s worked to fix the discrepancies in the TIL, which in turn made it easier for the subordinate units.

The brigade quickly realized that it was easier to break out the categories over several weeks. This plan took a total of five weeks:

- Week 1, personnel and class VII (major end items).
- Week 2, class I (subsistence) and class III.

- Week 3, class V (ammunition).
- Week 4, class IV (construction and barrier materials) and class II (clothing and individual equipment).
- Week 5, class IX (repair parts) and class VIII (medical materiel).

This plan also allowed the S-4 to continue to update the TIL and validate the data entered without overloading its shop.

Another part of the reporting phase is building logistics common operational pictures (LCOPs). BCS3 and LRT are great tools, but what they collect is just data without a way to depict the information for the commander. An LCOP formulates data into a relevant information package that a commander can use to make a decision.

Relevant LCOPs include locations of containers and equipment during deployment and redeployment, status and locations of supply points, route statuses, and convoy management. None of these LCOPs are outdated PowerPoint slides briefed days or hours after the fact; they are live and constantly updated within minutes. Units, sections, and operations centers can build these LCOPs as OpViews and send them to all BCS3s so that everyone can use them. [OpViews is a tool in BCS3 that takes a picture of the map, icons, and data that you want to allow another user in the BCS3 system to see. It keeps the operator from having to build the same picture himself.]

**Assessment phase.** In this phase, the 45th Sustainment Brigade used the working group to analyze the amount of time that BCS3 took subordinate units away from their missions before LRT implementation. The 45th Sustainment Brigade found that reporting took 10 minutes for a company clerk to input his status in LRT, which precluded the need to have extensive email traffic because only certain people could access the report on their computers. Anyone in the brigade or battalion who had LRT

on his computer could immediately access LRT to view the logistics posture. Staff sections did not need to copy and paste over data into a higher unit rollout.

Additionally, the brigade found that companies no longer submitted logistics reports for several supplies without an accurate picture of their status. One significant issue was how much ammunition the companies had on hand. Several companies had excess ammunition that a commander could transfer to another unit or turn in as excess for retrograde.

The goal of any staff is to give its commander the best and most accurate picture of the operational environment so that the commander can command his subordinate units and make timely and accurate decisions. A commander can choose to enforce outdated systems that cause his subordinates to spend more time providing that picture, or he can use the best systems available. I believe that BCS3 provides that system with timely, accurate, and efficient reporting.

The 45th Sustainment Brigade wanted to implement this system into daily operations. I believe we accomplished the basics and hope that you can learn from our efforts to do the same in your unit.

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# An Alternative to Traditional ILE

■ By Maj. Christopher Paone

If you are getting ready to apply for the Command and General Staff College's Intermediate Level Education (ILE), or if ILE is on your five-year career timeline, let me recommend a unique alternative. In lieu of the traditional ILE or similar intermediate service school opportunities, you can participate in the Interagency (IA) Exchange Program working for a national agency such as the Department of Homeland Security's Federal Emergency Management Agency (FEMA).

## What Is the IA Exchange Program?

The IA Exchange Program began in 2009 under the direction of then Lt. Gen. William Caldwell, the commandant of the Command and General Staff College and the commanding general of the Combined Arms Center at Fort Leavenworth, Kan. In Caldwell's words, the IA program was designed to "improve how we as an Army work in conjunction with other governmental departments and agencies."

The program gives Army captains and majors the opportunity to be assigned to a national agency located in the national capital region for one year as an Army interagency fellow. In turn, that agency typically exchanges one of its own civilian government employees, giving that employee the opportunity to attend a one-year ILE-equivalent opportunity at any qualifying school—not just at Fort Leavenworth.

## Is the IA Program Right for You?

Ask yourself these four questions to determine if the IA Exchange Program is right for you:

In the time that you worked with an interagency partner during deployments or training, did you find yourself curious about your interagency partner's work?

Would you and your unit have been more successful if you had a better understanding of each organization's capability early on?

Could you have benefited from an interagency relationship where you understood the interagency culture and its people?

Is it important to you to have the skill set to effectively communicate with civilian leaders in the Department of Defense (DOD), Congress, and the public?

Chances are that if you answered yes to any of those questions, the IA Exchange Program could prove to be a tipping point in your career. The program is a competitive fellowship, and if you are selected, it will provide you with the opportunity to help the DOD avoid redundancies and contradictory efforts in support of the national security strategy.

## What Is It Like to Be an IA Fellow?

In my own IA program fellowship, I have experienced governance, statesmanship, and diplomatic perspectives while working as a FEMA emergency management planner.

In short, my role is to facilitate the relationship between our intra-agency and interagency partners and the DOD while working with multiple national, regional, state, local, and private-sector organizations to analyze emergency response and recovery preparedness and operations.

Some of my responsibilities include drafting and presenting inter-

agency plans, policies, procedures, and resourcing solutions; participating in national-level workgroups to integrate domestic interests into a broad range of policies; recommending courses of action to Congress and the executive branch in the development of legislation for response requirements; and reviewing state and local emergency preparedness measures.

The Army recognizes the importance of developing leaders with additional skill sets that help them to communicate and lead at the senior levels of our military and across the federal government. Tomorrow's Army will require multiskilled, adaptive, and innovative leaders who understand the effects of both hard and soft power, from warfighting to enterprise management.

If what I have outlined here sounds interesting, consider applying to the program. This is an outstanding professional development opportunity and a mechanism for imparting a field grade officer's full-spectrum experience to members of a national-level organization.

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Maj. Christopher Paone is assigned to the Federal Emergency Management Agency as an interagency fellow. He has a bachelor's degree in business management from Providence College and master's degrees in business administration from the University of Maryland University College and in logistics management from the Florida Institute of Technology.

**Army Sustainment News**  
[www.army.mil/armysustainment](http://www.army.mil/armysustainment)



## 2012 Readership Survey Results

The exceptional response to the magazine's readership survey will provide valuable input and direction for the future of the Army sustainment community's professional bulletin.

■ By Fred W. Baker III, Editor

**W**e asked and you answered. The response we received to our 2012 readership survey was nothing short of outstanding. In fact, I believe it is probably the largest response to a survey of its kind for this magazine. More than 3,000 respondents answered questions related to the print version of the magazine, and more than 2,100 answered questions related to the *Army Sustainment* website.

As the rest of the Army transitions to prepare for the future, so must our magazine. Over time, reader habits change as new technologies are introduced and influence production, delivery capabilities, and demand. Content preferences change, and unless monitored, readership can shift away from publications that once served as a staple for industry-related topics.

For *Army Sustainment* to evolve, though, it needs data. It needs

to know who its readers are, why they choose to read the magazine, when, where, and how they consume its content, and what content and delivery preferences the magazine meets or fails to meet.

The information you have shared better prepares the magazine's staff to meet the Army sustainment community's needs for the future. It gives us and senior leaders the information needed to ensure we are making informed decisions regarding the magazine.

Of course, the magazine's staff did not design and distribute the survey and analyze its data alone. We owe a shout out of gratitude to those who helped make the survey a huge success. Danny Boyd, with the Combined Armed Support Command's (CASCOM) External Evaluation Branch, Directorate of Lessons Learned and Quality Assurance, helped design and admin-

### Sustain

"It is my favorite military logistics magazine. [I] look forward to every issue and keep the old ones for reference."

### Improve

"Sometimes it gets boring hearing what we all do/did for the last 10 years. Tell me something new and innovative."

*Survey Comments*

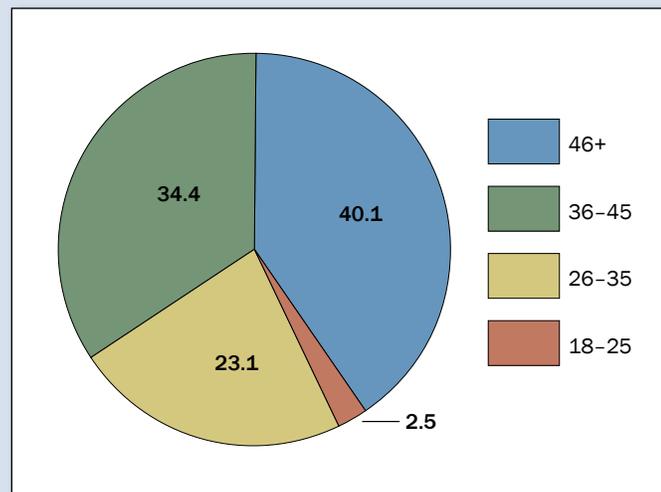


Figure 1. Age range.

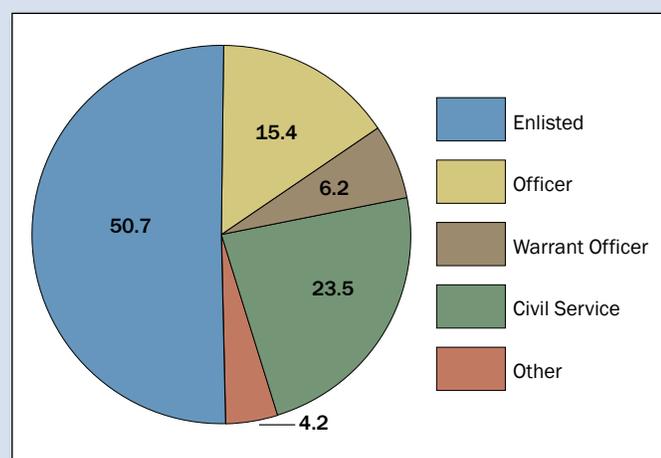


Figure 2. Occupational status.

**Sustain**  
 “Keep up the good work!  
 I am relatively new to this field and it  
 has been a great tool for what I do.”

**Demographics**

Figures 1 through 5 are basic demographic data collected from survey respondents displayed in percentages.

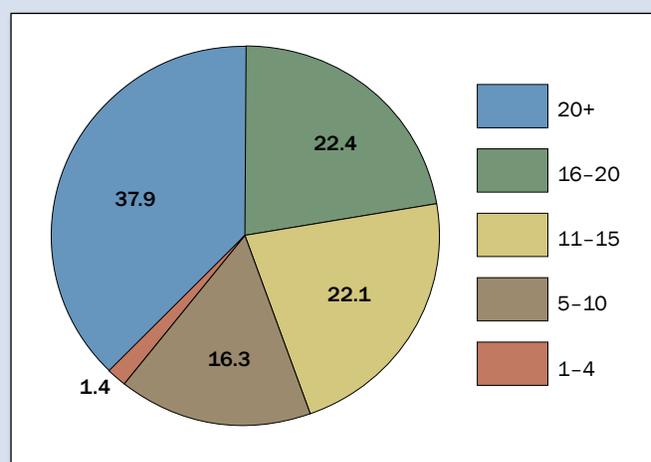


Figure 3. Military time in service.

ister the survey. His input gave us the direction and guidance needed to ensure the data we received was measurable in a way that is meaningful.

In addition, Patrick Conway, the chief knowledge officer for CASCOM, was instrumental in giving us valuable input and the reach we needed through his Sustainment Knowledge Network to deliver the survey right to the email inboxes of sustainers around the world.

Most importantly we thank you, our readers, for taking the time to respond to the survey. Through this survey, we hope to continue to provide a quality publication.

**About the Survey**

The survey was developed and

made available by open participation. Personnel were provided the survey link via email, or they could access the link from various website home pages. Maj. Gen. Larry D. Wyche, CASCOM commanding general, provided a written invitation to sustainers to participate in the survey.

The survey was available from Oct. 16 to Dec. 19, 2012, and consisted of closed-end, table, rank-order, and open-ended questions. In addition to answering the survey questions, respondents were given the opportunity to make general comments or add suggestions for improving the print and online versions of the magazine.

Because of the design of the survey, respondents could answer the

print questions, the website questions, or both if they were familiar with both products. If participants responded that they had not read the print version, they were directed to the website section of the survey. If they responded that they had not visited the *Army Sustainment* website, they were asked to exit the survey, visit the site, and return to the survey with their feedback.

This article presents only a portion of the data collected. As we continue to improve our print and online products, I hope to identify any changes and additions to content and methods of delivery as a reader suggestions based on this survey.

# Survey Comments

Below is a small sample of the hundreds of comments we received in the *Army Sustainment* 2012 readership survey. We are using the comments to identify areas that are meeting the needs of our readers and those that need to improve. We received several comments asking us not to discontinue the print version of the magazine, but we have no plan to do so at this time. We take those comments as both a compliment and a testament to the quality and relevance of our current print publication. The comments published here were edited for length, minor spelling, and punctuation. Brackets indicate that words have been inserted for the sake of clarity.

## Sustain

“Excellent publication and keeps me well-informed on current trends and operations in the sustainment community. As the Army transitions from combat operations to more of a sustainment role as we withdraw from the [area of operations], sustainers will need to [keep] up to speed on current operations and methods of retrograding and redeploying our forces.”

“Excellent way to keep the Soldier abreast of total logistics efforts.”

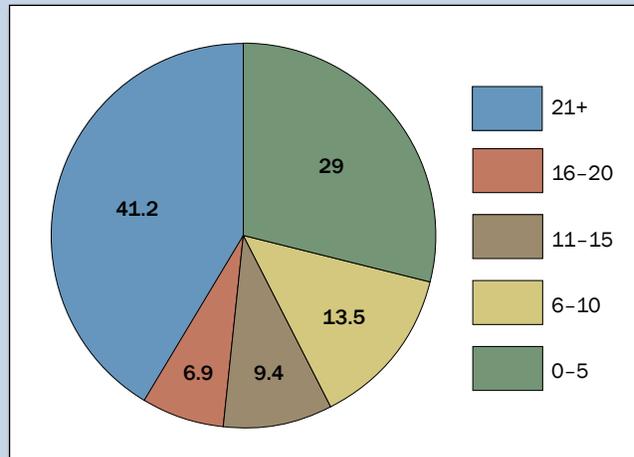


Figure 4. Civilian time serving in the sustainment community.

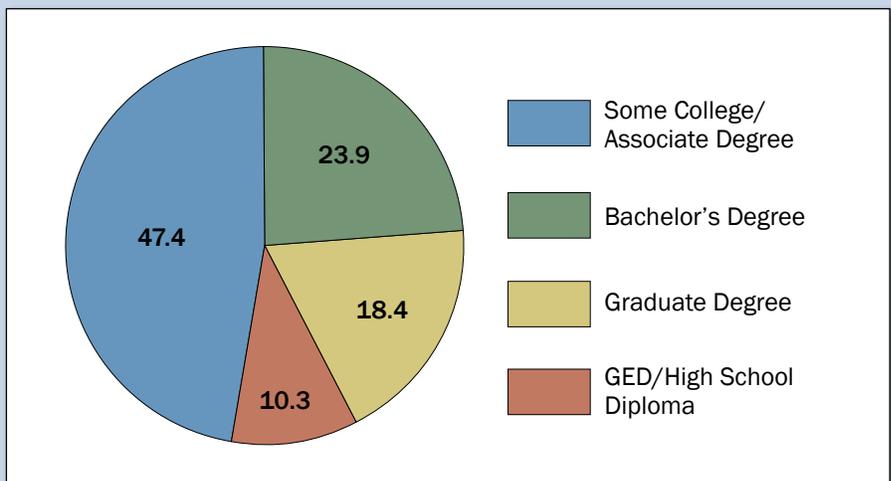


Figure 5. Highest level of civilian education completed.

### Content Preferences and Rankings

Figures 6 through 9 are basic data collected from survey respondents related to their content preferences and rankings of the current publication. Results for figures 6 through 7 are displayed in percentages. Results for figures 8 through 9 are displayed in the actual number of responses.

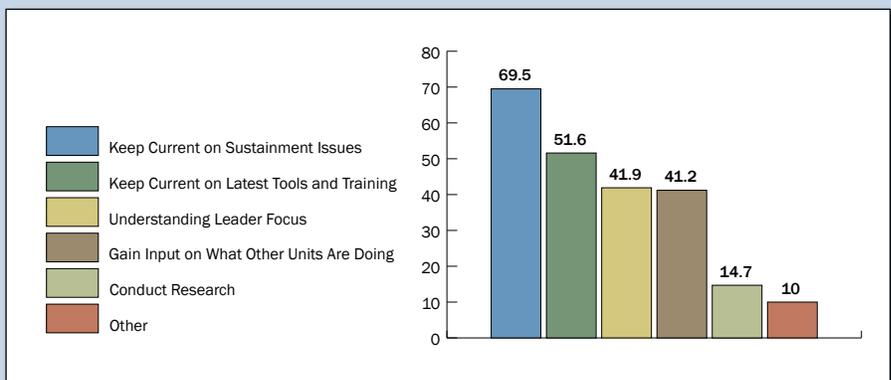


Figure 6. Respondents were asked their reason(s) for reading the print version of *Army Sustainment* magazine and had the option of selecting multiple responses.

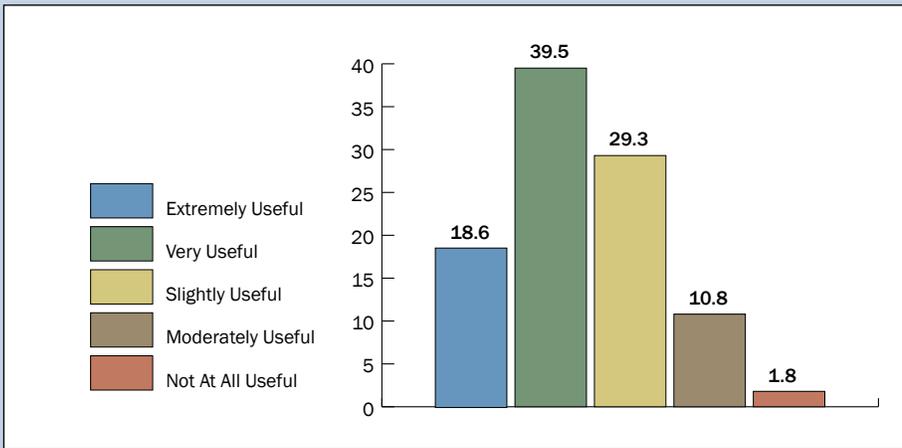


Figure 7. Respondents were asked, “How useful is the print version of *Army Sustainment* magazine in keeping you informed about matters related to your reason for reading the magazine?”

	1	2	3	4	5	6
<b>Current Operations Articles</b>	1236	727	457	285	135	42
<b>Training, Education and Tools Articles</b>	777	937	565	330	186	97
<b>Senior Leader Commentaries and Articles</b>	433	404	563	540	445	465
<b>Scholarly Articles on Current Topics</b>	204	354	568	695	607	399
<b>News and Photos</b>	196	343	444	530	637	700
<b>Historical Articles</b>	84	144	285	453	796	1068

Figure 8. Readers were asked to prioritize from most important (1) to the least important (6) the content they would like to see in the print version of *Army Sustainment* magazine.

	Excellent	Good	Average	Fair	Poor	No Basis to Judge
<b>Overall Relevance of Content</b>	793	1,626	350	74	9	82
<b>Overall Timeliness of Content</b>	570	1,499	605	135	18	107
<b>Overall Quality of Content</b>	781	1,575	408	77	13	80
<b>Overall Level of Satisfaction</b>	694	1,610	437	91	21	81

Figure 9. Respondents were asked to rate *Army Sustainment* magazine on the following areas: overall relevance of content, overall timeliness of content, overall quality of content, overall level of satisfaction (Respondents could only choose a single response for each topic.)

“Please continue to solicit articles from the sustainment community. The faculty here at [the Command and General Staff College] continually look for updated information, [tactics, techniques and procedures,] and lessons learned from your magazine. We often use these articles in our formal curriculum and as reference material when our students have issues in a particular area. It also offers the academic sustainment community an opportunity to publish research, doctrinal analysis, and perspectives.”

“I don’t recommend this magazine to go ‘digital only.’ I pass hard copies around my office so my coworkers can review first-hand what’s going on in the sustainment community.”

“Continue to do surveys and receive reader involvement, wants, needs, and assessments.”

“*Army Sustainment Magazine* is an awesome periodical which I view in both digital format and carry with me in hardcopy to share with peers.”

“Great magazine, would love to see more mobile apps.”

“Many of us load our iPhone, iPad, or smart device with professional readings to read during travel or other targets of opportunity to maximize the best use of our time. A mobile version of the magazine would be extremely beneficial.”

“[I want] more ‘purple’ articles on how the Marines, Navy, etc., handle sustainment.”

“I would like to see the articles written using more of the Soldiers’ or workers’ perspectives—capturing their ideas and their contributions to the accomplishments.”

“Get more articles from mid-careerists, staff sergeants specifically. Articles can be [in] quick lessons-learned formats as well as [opinions stating] what they think.”

“The timeline on publishing articles from the current operations is slow. This is a major detractor as the information should be timely to be effective. There should be an ability to comment on articles.”

# Army Sustainment Website Readership Survey Results

**B**elow is a summary of the data collected from respondents who chose to participate in the website portion of the *Army Sustainment* 2012 readership survey.

When asked their reasons for visiting the *Army Sustainment* website, the majority of the survey respondents choose the option “to keep current on latest news involving the sustainment community” (68.4 percent).

Using a scale of excellent, good, average, fair, poor or not applicable:

- Navigating the website was rated as good (55 percent).
- The appearance of the website was rated as good (53.6 percent).
- The process to find the information they sought on the website was rated as good (52.6 percent).
- The chance that respondents would return to use the website was rated as good (47.4 percent).

Using a scale of extremely easy, somewhat easy, neutral, somewhat difficult, extremely difficult, or not applicable:

- Researching information was rated as somewhat easy (45.1 percent).
- Getting the latest news and photos was rated as somewhat easy (44.4 percent).
- Viewing the print version online was rated as somewhat easy (38.2 percent).
- Downloading the print version of the magazine was rated as somewhat easy (36.0 percent).

A scale with the options of excellent, good, average, fair, poor, or no basis to judge was used to determine the survey respondents’ overall level of satisfaction:

- The overall level of satisfaction was rated as good (55.8 percent).
- The overall timeliness of website content was rated as good (55.2 percent).
- The overall relevance of website content was rated as good (54.9 percent).
- The overall quality of the website content was rated as good (54.2 percent).

## Try Our QR Codes

This quick response (QR) code allows readers to access the *Army Sustainment* website instantly on a smart phone or mobile device. To use the QR code, first download a QR code-reading application (app) onto your smart phone or mobile device and then use the app to scan the QR code. Keep up on the latest sustainment news, download the current issue, follow us on Facebook, Google+ or Twitter and stay connected to fellow sustainers!



News Page



Facebook



Google+



Twitter

# Army Sustainment Author Guidelines

**W**e are always looking for quality articles to share with the Army sustainment community. If you are interested in submitting an article to Army Sustainment, please follow these guidelines:

- Ensure your article is appropriate to the magazine's subjects, which include Army logistics, human resources, and financial management.
- Ensure that the article's information is technically accurate.
- Do not assume that those reading your article are Soldiers or that they have background knowledge of your subject; *Army Sustainment's* readership is broad.
- Write your article specifically for *Army Sustainment*. If you have submitted your article to other publications, please let us know at the

time of submission.

- Keep your writing simple and straightforward.
- Attribute all quotes to their correct sources.
- Identify all acronyms, technical terms, and publications (for example, Field Manual [FM] 4-0, Sustainment).
- Review a past issue of the magazine; it will be your best guide as you develop your article.

## Submitting an Article

Submit your article by email to [usarmy.lee.tradoc.mbx.leeasm@mail.mil](mailto:usarmy.lee.tradoc.mbx.leeasm@mail.mil).

Submit the article as a simple Microsoft Word document—not in layout format. We will determine the layout for publication.

Send photos as .jpg or .tif files at the highest resolution possible. Photos embedded in Word or PowerPoint cannot be used.

Include a description of each photo in your Word document.

Send photos and charts as separate documents.

For articles intended for the Operations department, obtain an official clearance for public release, unlimited distribution, from your public affairs and operational security offices before submitting your article. We will send you the forms necessary for these clearances.

If you have questions about these requirements, please contact us at [usarmy.lee.tradoc.mbx.leeasm@mail.mil](mailto:usarmy.lee.tradoc.mbx.leeasm@mail.mil) or (804) 765-4761 or DSN 539-4761.

## Departments

Your submission should be geared toward one of *Army Sustainment's* departments, which are described in detail below. If you have an article that does not fit into one of our departments but you think it is appropriate for our audience, feel free to contact us.

**Commentary** articles contain opinions and informed criticisms. Commentaries are intended to promote independent thoughts and new ideas. Commentary articles typically are 800–1,600 words.

**Features** includes articles that offer broader perspectives on topics that impact a large portion of our readership. These can focus on current hot topics, or the future of the force. These articles can be referenced, but it is not required if the content is within the purview of the author. While these articles can be analytic in nature and can draw conclusions, they should not be opinion pieces. Feature typically are between 1,600 and 5,000 words.

**Spectrum** is a department of Army Sustainment intended to present well-researched, referenced articles typical of a scholarly journal. Spectrum articles most often contain footnotes that include bibliographical information or tangential thoughts. In cooperation with the Army Logistics University, *Army Sustainment* has implemented the a double-blind peer review for all articles appearing in its Spectrum section. Peer review is an objective process at the heart of good scholarly publishing and is carried out by most reputable academic journals. Spectrum articles typically are 2,500–5,000 words.

**Operations** includes articles that describe units' recent deployments or operations. These articles should include lessons learned and offer suggestions for other units that will be taking on similar missions. These articles require an official clearance for open publication from the author's unit. Photo submissions are highly encouraged in this section. Please try to include 5–10 high-

resolution photos of varying subject matter. Operations articles typically are 1,200–2,400 words.

**Training and Education** is dedicated to sharing new ideas and lessons learned about how Army sustainers are being taught, both on the field and in the classroom. Training and Education articles typically are 600–1,100 words.

**Tools** articles contain information that other units can apply directly or modify to use in their current operations. These articles typically contain charts and graphs and include detailed information regarding unit formations, systems applications, and current regulations. Tools articles typically are 600–1,800 words.

**History** includes articles that discuss sustainment aspects of past wars, battles, and operations. History articles should include graphics such as maps, charts, old photographs, etc., that support the content of the article. History articles typically are 1,200–3,000 words.

ISSN 2153-5973  
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ARMY SUSTAINMENT  
US ARMY LOGISTICS UNIVERSITY  
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FORT LEE VIRGINIA 23801-1705

Official Business

PERIODICALS POSTAGE  
AND FEES PAID  
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AND ADDITIONAL CITIES



### **Sustainer Spotlight**

*The III Corps and Fort Hood, Texas, culinary arts team was recognized as the Culinary Team of the Year on Mar. 15, 2013, for their performance in the 38th Military Culinary Arts Competitive Training Event at Fort Lee, Va. More than 200 service members participated in the weeklong event that showcased the skills of military chefs. Senior Chief Petty Officer Derrick Davenport, from the Chairman of the Joint Chiefs of Staff, was named the Armed Forces Chef of the Year. Staff Sgt. Billy Dauge, from the Chairman of the Joint Chiefs of Staff, is the Armed Forces Master Chef of the Year. Spc. Mikalia Jules, from Fort Stewart, Ga., is the Armed Forces Student Chef of the Year. (Photo by Julianne E. Cochran, Army Sustainment)*